The work: Prepare for an efficient and peaceful transfer of control over cherished assets at death ~ what if you do not make it home today?

Common beliefs that lead folks astray:
✓ “I don’t have enough assets to justify a will”
✓ “I won’t be here, so it won’t matter to me”
✓ “Everyone will get along”

Organize your thoughts and seize control over your planning:

Who is in your family (what are the ages, personalities, conflicts)
What do you own (get the details)
How do you own it (get more details)
Who inherits (family members, charitable organizations, etc.)

Who should be in charge
✓ Financial and medical “agent”
✓ Guardian for minor children
✓ Executor under the Will
✓ Trustee of trust

Create your estate plan: Be committed to ensuring a peaceful, efficient, and economical transfer of assets to those you love or wish to benefit.

Powers of Attorney:
Durable Power of Attorney for financial decision making
Advance Directive for health care decision making

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