

# Estate Planning at RMR Wealth



Modern digital platform to sync and visualize everything you own.



Your choice of plans and documents to suit your family's needs.



Ongoing education and resources to keep your plan up to date and valid

## Documents Explained

### Last Will & Testament

A last will and testament is a legal document that names your executor and communicates your final wishes pertaining to assets and beneficiaries.

### Revocable Trust & Pourover Will

A revocable trust is often used in estate planning to accomplish the settlor's testamentary intent while avoiding the probate process. The pour-over will is a truncated will that transfers the estate into the trust.

### Guardianship Nominations

If something happens and your children need a guardian, these are non-binding instructions to the judge regarding who you would like to care for your children.

### Financial Power of Attorney

A durable power of attorney allows you to indicate who should manage your financial affairs if something happens to you.

### Advance Health Care Directive

An advance healthcare directive allows you to indicate who should make decisions and what are your wishes regarding your health care. Legally, the only binding part may be picking the agent.

Plans Available - \$750	Core	Will	Trust
Platform Access	✓	✓	✓
Advance Health Care Directive	✓	✓	✓
Financial Power of Attorney	✓	✓	✓
Nomination of Guardianship	✓	✓	✓
Last Will & Testament		✓	✓
Revocable Trust & Pourover Will			✓

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