



Don't Ignore These Planning Documents

There are certain relationships in your life that, to be successful, really need to be built on trust. Your physician, for example. Your attorney. And yes, your financial professional, too. As a client, it's critical that you receive informed advice and sound guidance based on your goals. The responsibility of any financial professional is to be realistic about the future and a client's financial picture.

One of those topics is estate planning. Often clients can become uneasy when the discussion of an estate plan comes up. Thoughts that estate plans are too expensive to create, or that you only need one if you're a millionaire couldn't be further from the truth. In fact, not having an estate plan in place is one of the biggest mistakes clients make, directly impacting their loved ones in ways they never anticipated. Over the coming months, you'll be receiving a list of the top five estate planning mistakes to avoid. Read them. Consider them. And if you want to discuss any of the topics covered in these monthly emails, reach out and we'll connect. It's too important not to.

Here's **Estate Planning Mistake #1: Ignoring basic documents**

- A will ensures your wishes are honored regarding your assets and, if you have minor children, their guardianship. Click [here](#) for a basic will form.
- A Durable Power of Attorney designates a person to make decisions about your finances if you're incapacitated. Click [here](#) for a listing of Durable Power of Attorney forms for your state.
- A Living Will ensures your healthcare wishes are followed. For example, if you don't wish to be resuscitated, or kept alive by artificial means. Click [here](#) for a listing of Living Will forms for your state.
- A Medical Power of Attorney directs healthcare needs if you're unable to decide for yourself. Click [here](#) for a listing of Medical Power of Attorney forms for your state.

It's a good idea to have an attorney review your documents, especially if you have a larger estate or multiple heirs, but these offer a good start. Take a look, and let's connect and review your estate assets together.

Want to hear more - check out our podcast on [The Family Love Letter](#)