



Prepare for the future with an estate plan

Do you understand the essentials of an estate plan?

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| <input type="checkbox"/> Will | A document that spells out who gets what, names guardians for minor children and expresses other wishes. State law will determine how your estate is settled in the absence of a will |
| <input type="checkbox"/> Healthcare directives or living will | A document that clearly states your health care preferences and beliefs and states extra ordinary measures you want or do not want taken. This document can greatly ease decision-making for your loved ones during highly emotional and stressful times. |
| <input type="checkbox"/> Financial power of attorney | A legal document that names another person as your financial agent and gives them control over your financial accounts. This is a person you trust to pay your bills, manage your investments and make key financial decisions. |
| <input type="checkbox"/> Beneficiary designations | Designates retirement and pension accounts, life insurance policies, property and business ownership and brokerage and bank accounts. Beneficiary designations generally overrule statements in your will. |

For help creating a plan that best suits your needs, contact:

<AdvisorName>, <AdvisorDesignations>
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<TeamName>
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