

GETTING STARTED ESTATE PLANNING



LIVING WILL

- End of life guidance for healthcare
- Enacted if unresponsive

wishes during your lifetime

POWER OF ATTORNEY

- Delegate financial and medical decisionmaking power
- Enacted if incapacitated & unable to make decisions; requires physician's letter

WILL & TESTAMENT

- Distribution of assets
- Reduce tax burden on beneficiaries
- Name guardian for minor children
- Enacted after 6-12 months probate period after passing

wishes after your lifetime

2. NAME IN DOCUMENTS

HEALTHCARE
AGENT

FINANCIAL
POWER OF
ATTORNEY

MEDICAL
POWER OF
ATTORNEY

EXECUTOR

GUARDIANS

BENEFICIARIES

3. REVISIT ANNUALLY