

3-STEP PLANNING PROCESS

Creating an estate plan is a vital part of an overall financial plan. Yet, many people don't have a Will and if they do, it may be outdated. In addition to the Will, it's also important to have Powers of Attorney in place both for property and for personal care.

Use this 3-Step Planning Process tool to help you **Think About**, **Talk About**, and **Take Action** on creating your estate plan. Your family will receive the gift of knowing they've done exactly what you would want them to do to protect both your wishes and hard-earned possessions.



*Your Will is about the people you love and their quality of life when you're gone.
Powers of Attorney are about the quality of your life, while you're still here.*

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1. What are your wishes for things, such as:

- > funeral arrangements
- > distribution of assets
- > family home and any other property possessions with emotional value (but not monetary)
- > choice of estate Executor or Agent
- > choice of Attorney(s) for property & personal care
- > special bequests, philanthropy
- > pets, reward program points, digital assets



2. Have Essential Conversations, including the important people who will be involved, impacted, or possibly disruptive.

- > Family members
- > Friends
- > Professionals



3. Complete or update all documents:

- > Will
- > Power of Attorney for Property
- > Power of Attorney for Personal Care

1. My wishes:

2. People I need to talk to:

3. Things I need to do:
