



ESTATE PLANNING

SIX STEPS TOWARD A SUCCESSFUL PLAN

1

SEEK PROFESSIONAL ASSISTANCE

Consult with an experienced estate planning attorney with whom you are comfortable. It may also help to consult with accountants and financial planners.

2

CREATE YOUR WILL

Select a personal representative and direct how your property will be distributed upon your death. Select a guardian for minors and include trust provisions.

3

EXECUTE A DURABLE POWER OF ATTORNEY (DPOA)

Allow a trusted person to make vital decisions regarding your business, legal and financial affairs. Eliminate the need for court involvement and oversight regarding your affairs.

4

EXECUTE ADVANCED DIRECTIVES

Everyone should have a Living Will and Health Care Durable Power of Attorney. If you become terminally ill or permanently unconscious, nominate an agent to follow your decisions regarding life-sustaining treatment. Also, authorize another person to make health care decisions on your behalf if you cannot make them for yourself.

5

CONSIDER A LIVING TRUST

A Trust can be funded during your life or at the time of your death and can be amended or revoked at any time during your lifetime.

6

INDIVIDUALIZE YOUR PLAN

Every person and estate plan is unique. Your plan will vary depending on your family, assets and goals. Take time to design a plan to fit your individual and family needs.

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