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ESTATE PLANNING PREP WORK MADE EASY

Many people don’t know where to begin with the process of estate planning. Our guided process will help you get everything ready for a meeting with your attorney. Get a pad and pencil and go to a quiet place with no distractions – then make some notes.

PEOPLE: List family members, friends and charities for whom you would like to provide.

PROPERTY: Summarize all the property you own: bank accounts, home, valuables, investments, life insurance and retirement plans, automobiles. Be sure to note how things are titled, as well as beneficiaries.

PLANS: Think about how your property can best be distributed. Often this is using percentages. Many people include their charitable interests once loved ones have been provided for.

PLANNERS: Now list your professional advisors. They may have valuable information about your affairs. Have your key advisor coordinate communications and confirm details.

You want to be certain your will is updated and that it reflects your desires.

Contact us for our free workbook "Giving Through Your Will." We will also be pleased to discuss ways in which you can meet your charitable goals by including Phoebe in your planning.