



FOUR CRITICAL

Estate Planning Documents

Estate planning is the process of securing and simplifying your family's future after you're gone. It's the best way to ensure your loved ones receive what you have worked so hard to earn. It's also a critical part of establishing your legacy.

Proper estate planning requires you make certain decisions well in advance. There are four critical documents that will ensure these decisions - as well as your other wishes - are carried out. Each should be a part of your estate plan.

THE IMPORTANCE OF PLANNING AHEAD

Preparing each of the documents listed below ahead of time can relieve you and your family years worth of needless worry, headaches, and expense. If you need assistance with any of these documents, please contact me as soon as possible. Together, we can review your estate plan to determine any gaps, and I can put you in touch with a great estate planning attorney who can assist you further.

POWER OF ATTORNEY

Your power of attorney allows you to appoint someone to make legal decisions on your behalf, usually regarding your property and finances. That person, referred to as an "agent", could be a trusted friend, family member, or even an experienced professional. Power of attorney is crucial should you ever become ill or disabled to the point where you can no longer make such decisions yourself.



ADVANCED MEDICAL DIRECTIVES

This catch-all term refers to **health care directives, living wills, medical power of attorney, HIPAA release forms**, and other directives relating to your health. All of these documents allow you to legally express your preference for how to be treated should you become terminally ill.



YOUR WILL

A will states how you want your belongings distributed amongst your loved ones after you pass away. Without a will, the government will determine how to divvy up your property - some of which may end up in the government's own hands!



LETTER OF INSTRUCTIONS

This document gives your surviving loved ones important information about financial and personal matters to attend to after your passing. You don't need an attorney to prepare it, and while it doesn't carry the legal weight of a will, your **Letter of Instructions** will clarify any special requests you want carried out once you're gone.



"Planning is bringing the future into the present so that you can do something about it now." - Alan Lakein