

6 CORE ESTATE PLANNING DOCUMENTS



LAST WILL & TESTAMENT

Outlines how you want your assets distributed and who will care for any minor children after your death.



REVOCABLE LIVING TRUST

Manage and distribute assets during your lifetime and after you die without going through probate.



DURABLE POWER OF ATTORNEY

Gives someone you trust the authority to manage your finances on your behalf.



ADVANCE HEALTHCARE DIRECTIVE

Specifies your medical treatment preferences and designates someone to make decisions you're unable to.



BENEFICIARY DESIGNATIONS

Specify who will receive certain assets such as life insurance or retirement accounts.



LETTER OF INTENT

Supplements a will or trust, expressing personal wishes, funeral arrangements, account details, and any final messages.

