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PRIVATE WEALTH MANAGEMENT

Estate Planning Benefit

Get peace of mind with an estate plan in place

You now have unlimited access to the most comprehensive digital estate planning solution on the market, provided to you due to your advisor's partnership with wealth.com.

Your family
Designate a guardian for your child in the event of a catastrophe

Your possessions
Ensure the things you care about most go to those who'll cherish them

Your health
Nominate a person you trust to make healthcare decisions on your behalf

Your finances
Appoint someone you trust to handle bank and retirement accounts

Your pets
Don't leave your pet without a safe home and trusted guardian if you can't care for them

Your legacy
Continue to support the causes that mean the most to you

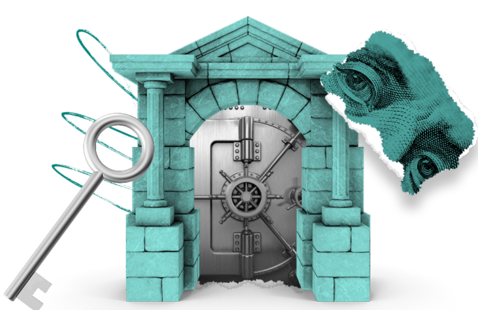
What You Get

Modern digital platform to sync and visualize everything you own

Your choice of plans and documents to suit your family's needs

Secure digital storage for your plan and other important documents

Ongoing education & resources to keep your plan up to date and valid



You Can Trust Your Information is Safe

Security is our top priority. Our multi-layer security protects your privacy and keeps your personal information and financial data safe.

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Your Documents Explained

Last Will & Testament

A last will and testament is a legal document that names your executor and communicates your final wishes pertaining to assets and beneficiaries.

Revocable Trust & Pourover Will

A revocable trust is often used in estate planning to accomplish the settlor's testamentary intent while avoiding the probate process. The pour-over will is a truncated will that transfers the estate into the trust.

Guardianship Nominations

If something happens and your children need a guardian, these are non-binding instructions to the judge regarding who you would like to care for your children.

Advance Health Care Directive

An advance healthcare directive allows you to indicate who should make decisions and what are your wishes regarding your health care. Legally, the only binding part may be picking the agent.

Financial Power of Attorney

A durable power of attorney allows you to indicate who should manage your financial affairs if something happens to you.

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Is Estate Planning for Me?

I don't have kids. Why do I need an estate plan?

Whether ensuring your pet's ongoing care or making a legacy donation, there's more to an estate planning than inheritance

I don't have enough money saved or valuable possessions

Whether you have $3,000 or $300,000 - no one but you should decide what to do with that money.

I can always get around to it later. Why do i need one now?

No one can predict the future. If something were to happen to both you and your spouse, who would you trust with your legacy?

I hate thinking about death.

Unfortunately death is an unavoidable part of life. We might not be able to control when we die, but an estate plan gives you a say in the process.

I'm not a wealthy person. Why do I need this?

It's not always about the money. If you have a family heirloom, a special collection, or anything that holds sentimental value, you want it to go to someone who'll cherish it.

I'm afraid to talk about end of life with my family.

Having conversations with family members about death and aging can be tough, but setting up an estate plan helps everyone get on the same page, avoiding family disputes down the road.