

# Estate Planning For Families



## What will happen to your family if you're no longer here?

No one wants to think about death, but it's important to properly prepare in case the unthinkable happens. Without a will, guardians named for your children, health directives, and other vital documents your family will not be prepared if the worst were to happen.

## Estate Planning Checklist

These are a few of the documents that you should have in place to ensure your family is protected and your final wishes are carried out.

<input type="checkbox"/> Last Will and Testament or Trust		<input type="checkbox"/> Proof of Identity	
<input type="checkbox"/> Executor of Your Estate		<input type="checkbox"/> Social Security Card	<input type="checkbox"/> Marriage License
<input type="checkbox"/> Beneficiaries of Your Estate		<input type="checkbox"/> Driver's License	<input type="checkbox"/> Divorce Decree
<input type="checkbox"/> Guardians for Minor Children		<input type="checkbox"/> Birth Certificate	<input type="checkbox"/> Passport
<input type="checkbox"/> Beneficiaries for		<input type="checkbox"/> Home Ownership	
<input type="checkbox"/> Bank Accounts	<input type="checkbox"/> Stock/Investments	<input type="checkbox"/> Title	<input type="checkbox"/> Mortgage Papers
<input type="checkbox"/> 401Ks/IRAs	<input type="checkbox"/> Emails	<input type="checkbox"/> Property Deeds	
<input type="checkbox"/> Life Insurance Policies	<input type="checkbox"/> Financial Accounts	<input type="checkbox"/> Funeral Plan (service wishes, cremation and burial preferences, etc.)	
<input type="checkbox"/> Pensions		<input type="checkbox"/> Power of Attorney	
<input type="checkbox"/> Healthcare Directives (like end-of-life instructions)		<input type="checkbox"/> Make sure loved ones know where to find all important documents.	

For assistance with estate planning or for questions reach out to:

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