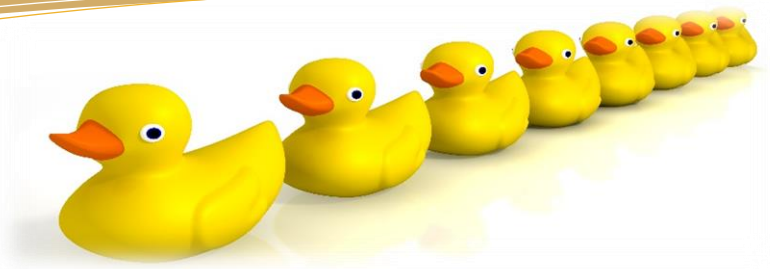


creating &
managing
wealth



YOUR BENEFICIARIES WILL THANK YOU...

NO ONE WANTS TO LEAVE A BURDEN TO THEIR LOVED ONES UPON THEIR DEATH.
YOU CAN TAKE THESE IMPORTANT STEPS TO EASE THEIR BURDEN:

- Organize legal documents
 - Up-to-date will and/or trusts
 - Birth or adoption records/certificates
 - Marriage certificates
 - Divorce, separation or annulment records
 - Insurance policies – life, home, auto, long term care, etc.
 - Military service records
 - Contracts and/or any business agreements
 - Health care directives and power of attorney designations
- Organize financial assets and obligations
 - List of all assets - where they are held and how they are titled
 - Confirm and update beneficiary listings on all 'operation of law' accounts – annuities, 401k, IRA, etc.
 - Check insurance policies - coverage amounts, protection, beneficiaries, etc.
 - Copies of recent bank and credit card statements – checking, savings, and brokerage accounts
 - Copies of auto titles, property deeds, and any other personal property
 - List of all leases, credit cards, auto payments, utilities, reverse mortgage info, etc.
 - Ensure spouse, a child, or an executor of your estate is named as an access person on accounts
 - List of personal 'Board of Directors' – Attorney, CPA, Financial Planner, P&C Agent, Bankers – that your family can contact

These steps can help shield your loved ones from some unnecessary court/legal fees, taxes, strife, and family feuds during this emotional time of loss.

If you have any questions, or need help securing your financial future please contact us at (877) 514-9477.

The information presented does not constitute investment advice and is not intended as legal or tax advice. For legal or tax advice, please consult an attorney or tax consultant.



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