

# Estate Planning Benefit



## Get peace of mind with an estate plan in place

From ensuring your healthcare and end of life wishes are respected to establishing how loved ones are cared for and directing where your things go after you die, having a comprehensive estate plan in place is essential for any adult 18 or older. An estate plan helps you care for...

### Your family

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

### Your health

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

### Your pets

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

### Your possessions

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

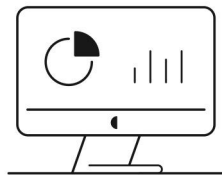
### Your finances

Appoint someone you trust to handle bank and retirement accounts

### Your legacy

Continue to support the causes that mean the most to you

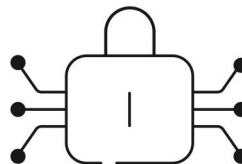
## What you get



Modern digital platform to sync and visualize everything you own



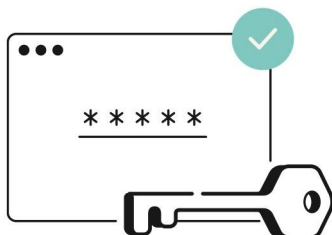
Your choice of plans and documents to suit your family's needs



Secure digital storage for your plan and other important documents



Ongoing education and 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.

Learn more at [wealth.com](https://www.wealth.com)

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**WILSON WEALTH**

# Plans Explained



Wealth offers three different plan types for individuals or couples. Once you enroll, you'll choose the plan that best fits your needs. Don't worry if you aren't sure which plan is right for you - our quick assessment can help you figure that out.

	Core	Will	Trust
Wealth Platform Access	✓	✓	✓
Advance Health Care Directive	✓	✓	✓
Financial Power of Attorney	✓	✓	✓
Nomination of Guardianship	✓	✓	✓
Last Will & Testament		✓	✓
Revocable Trust & Pourover Will			✓

## 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.

Learn more at [wealth.com](https://wealth.com)

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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 plan 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.



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