Estate Plan Solution

Through our continued due diligence to find the best financial solutions for our clients, we have entered into a partnership with Wealth.com to offer comprehensive estate planning document creation to our clients. This type of service can range from $500-$2000, depending on whether you use an online solution or an estate plan attorney. However, we are offering this service **free of charge** for your ongoing clients.

Estate planning is a key part of a robust financial plan and we believe that everyone should have documents in place to help ensure that their wishes are carried out in end-of-life situations.

Through our partnership with Wealth.com you can create the key documents you'll need to cover the most common scenarios including:

Will - Specify how your assets should be distributed in the case of your passing.

Nomination of Guardianship - If you have minor children, you can specify who should be their guardian if you were to pass.

Revocable Trust - A Trust is a legal entity that can hold your assets and distribute them along the guidelines of the that you specify in the trust. You can specify not only who should get your assets, but who oversees that distribution, and the timeline. Revocable Trusts are often necessary for when you have minor children and would like to distribute assets over time to ensure they are used wisely.

Advanced Health Care Directive - Allows you to appoint individuals who will make health care decisions on your behalf if you are incapacitated and leaves instructions on end-of-life decisions.

Financial Power of Attorney - Allows you to appoint individuals to make financial decisions on your behalf if you are incapacitated.

Wealth.com is a best-in-class platform that not only allows you to easily create these documents, but will store them as well. If you need to update your plans, you can do that at any time. The interface allows for visualization of your decision process. You can use the platform to track your assets and project estate taxes. In addition, if you move states, the platform will automatically update your documents to conform with state law.

If you have existing estate plans you can scan and upload those documents and wealth.com can extract the information within and make optimization suggestions.

For our ongoing clients, access to this service is completely **free of charge.**

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