# ESTATE PLANNING WORKBOOK

# HOW TO GIVE THE BEST GIFT

YOU CAN GIVE YOUR FAMILY



wills & wellness estate planning

Foundation. Family. Future.

# 3 WAYS TO GET MASSIVE VALUE

#### FROM THIS WORKBOOK



Print this workbook and use it during our educational webinar to stay fully engaged and take notes on the actions you want to implement quickly.



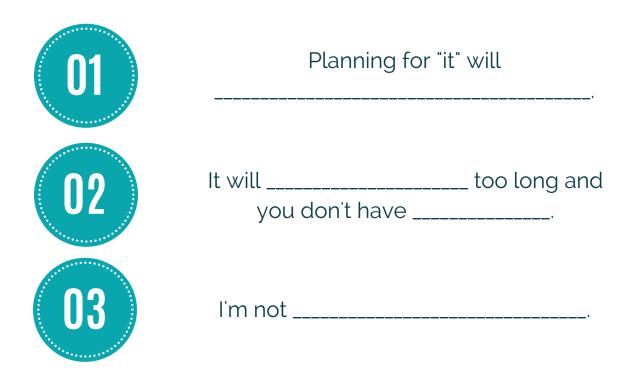
Think of ONE question you want answered while we are live together. If I don't answer your question during the webinar, you can ask it during the Q&A.



Think about the people in your life who you trust most. During the webinar, imagine them in the roles presented and imagine what they would want to know.

# THE 3 BIGGEST REAL FEARS

#### **ABOUT ESTATE PLANNING**



# THE BIG PICTURE

Estate planning isn't about
it's about the
people you
They'll know whether you
lived up to your promise
u n

#### **LIFE INSURANCE TO A MINOR**

01	required.	_ court is
02		and crump a wil
03	Asubstitute	is a will

#### **EMERGENCY SITUATION**

01	as important as who ra	ardianship is just aises your kids.
02	Only default temporary	
03	Your plan you share it wit	

#### **ADULT IS INCAPACITATED**



The doctors can talk to \_\_\_\_ about your condition.



Medical decisions are made by \_\_\_\_\_ by default.



It doesn't make a difference if

#### A PARENT PASSES AWAY

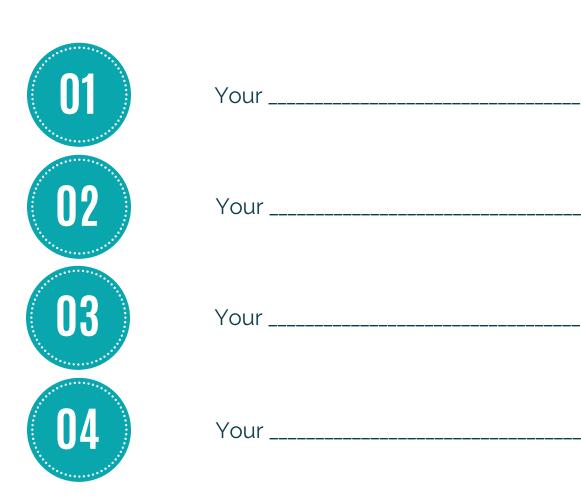
01	When to is decided as a group.
02	A has the final say-so of who is guardian of your kids
03	real estate mear probate .

#### YOUNG ADULTS INHERIT

01	comes before the kids.
02	means heirs have complete control over the money.
03	You can build in a to help your heirs

# **BONUS LESSON**

#### WHAT MATTERS MOST



## HOW TO TAKE ACTION

#### (BEFORE IT'S TOO LATE)



#### IDEAS, INSIGHTS AND ACTION ITEMS



If you want to do the Group Workshop, your Design Meeting is pre-scheduled for the first Friday of the month at 2pm.