

## Assemble Your Estate Planning Team

Even the best road trips are better with good company. Your estate planning journey is no different. Here are the key people you'll want on your team:

### Financial Planner/Wealth Advisor

Assesses your overall financial health and assists in making decisions to meet future financial goals.

### Insurance Professional

Provides an analysis of your current and future insurance needs to help ensure that estate final expenses, taxes and beneficiaries are covered.

### Accountant or CPA

Brings valuable tax strategies to the planning process, which can reduce taxes and aid in trust planning.

### Executor

Carries out the terms of your will, so choose someone who is reliable, responsible, trustworthy and organized.

### Guardian

Cares for your children and dependents. If you don't choose a guardian, the court appoints someone.

### Agent for Durable Power of Attorney

Acts as your financial decision maker if you are not able to make your own decisions.

### Agent for Health Care Power of Attorney

Makes health care decisions if you are not able to make them for yourself.

### Estate Planning Attorney

Helps you document your wishes accurately in your will and other legal documents.

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## Beyond Retirement: YOUR PLANNING ROADMAP



# Your Journey Starts Here

If you've put off writing your will or making plans for your estate, you're not alone. Estate planning is not a chore. It is an opportunity to create your legacy.

Don't wait to take the first step—you may actually feel relieved as you get things in order. Plus, you can rest easy knowing that you are setting your family up for success. And that's a legacy for which you can be proud.

Here are five straightforward steps you should take on your planning journey.



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## STEP 1: Know what you have.

Your first task in planning is to figure out what you have. Your inventory should include:

- Assets, including the estimated value and whether they are held in your name, jointly or, in certain states, as community property
- Debts and liabilities
- Life insurance information, including policy specifics such as owner and beneficiary
- Retirement and savings plans along with named beneficiaries
- A list of charitable organizations that are close to your heart
- The location of your will or other documents

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## STEP 2: Make key decisions.

An up-to-date will or trust is the most important tool in your planning journey. Without this vital document, state law will divide your estate according to a rigid formula that probably won't match what you want. Don't go one step further without deciding which people and organizations you want to benefit through your will.

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## STEP 3: Choose your team.

You don't have to go it alone with estate planning. Pull together a strong team to help with this journey.

Turn the page to see a list of major players.

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## STEP 4: Make it official.

One of the last steps in your planning journey involves sitting down with your estate planning attorney to create your new estate documents. Before this meeting, take time to review your decisions and the lists you've made so your wishes are clear.

This information is useful for when your attorney evaluates your individual circumstances and walks you through tax and financial concerns.

If you are thinking about adding a gift to benefit Methodist Hospital Foundation to your plans, our staff is happy to meet with you (and any other team members you wish to include) to answer any questions you may have, with no obligation.

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## Step 5: Give yourself a high five!

Estate planning might have seemed daunting when you started, but you realized you can accomplish big things in a few simple steps.

We're here to help you, and we would love to talk with you about how Methodist Hospital Foundation can be part of your planning journey. Contact us today to start a conversation.