

Core Estate Planning Documents



Registered Investment Advisor
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Formal will – a legal document in which you name an executor to oversee your estate and declare your wishes regarding the final disposition of your assets and guardianship of your children.

Guardianship for minor children – many states require that you have an additional guardianship document along with your will in the event you become incapacitated and unable to care for your children.

Durable power of attorney for finances – a document that allows you to designate someone to make financial decisions on your behalf without a court process in the event you become incapacitated.

Durable power of attorney for healthcare – a document that allows you to designate someone to make healthcare decisions on your behalf without a court process in the event you become incapacitated.

Living will – a document that provides the best place to state the conditions under which you would or would not like to receive medical treatment, as well as what kind of treatment you would permit.

Naming beneficiaries – insurance contracts and retirement plans are treated like contracts and, therefore, cannot be willed to beneficiaries; they must be passed to heirs according to stated beneficiary designations immediately upon initiation and should be updated regularly, thereafter.



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