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WILLS, BEQUESTS AND TRUSTS

HAVE YOU CREATED A PLAN FOR YOUR FUTURE?

No matter the size of your estate, everyone needs a plan for the future. A plan helps to ensure that your wishes are carried out and your loved ones well cared for after you are gone.

If you are like most people, chances are you need to do some planning, or at least update the plans you already have in place. The good news is that we've made creating your plan easier than ever before.

WHERE CAN I OBTAIN MORE INFORMATION ON ESTATE PLANNING?

As you are completing the **Wills Planner**, you may find that you have questions. We would like to give you a free book—*Provide & Protect*—to answer important questions about the estate planning process. The book addresses ways to pass benefits to your children and other family members, how to prepare your advisors to make crucial decisions on your behalf, how to gather your property information and make key estate planning decisions. You may also take the quiz at the end of each chapter. Then view the answers online. To request your free copy of *Provide & Protect*, please call or click.



CREATE YOUR PLAN

While we would never attend a Broadway musical without a ticket or take a trip without luggage, most Americans have not taken the time to plan for their future.

We simply never get around to doing it. The result is disappointing. When we fail to plan, our dreams, wishes and hopes may never be fully realized. Unfortunately, this also means our family and beneficiaries experience the expense and frustration of estate administration. A few months of probate can destroy what it took a lifetime to create. Don't let this happen to you or your family.

The good news is that planning is easy and rewarding. In the

following pages, we'll show how simple and enjoyable it can be. In less time than it takes to choose and arrange a summer vacation, you can complete a plan that outlines your goals and lets your family and friends know the values you hold dearly. Take the time to plan your life, your future, and your legacy. You will be glad you did, and every day thereafter, you can expect the peace and comfort of knowing the life you live today will matter tomorrow.

HOW CAN I BEGIN PLANNING ONLINE?

Creating your plan is easier than ever before when you use the online **Wills Planner** available on our website. Organize your family, estate information and goals using the secure system. When finished, you may share your information with an online attorney to complete your will or trust plan. If you have questions, information can be shared through the system so we may better assist you.



To get started please visit our website and click on **“Plan Your Will.”** Create a username and password; then login. Enter information on your family, contacts and healthcare, finances and your estate. Once you have completed all sections of the **Wills Planner**, click on **“Create a PDF”** to compile the information your attorney will need to finalize your plan. Be sure to have your attorney review your will. It is not legal until they do so.