

Truth About Estate Planning

Is Your Estate Planning all it Should be
or Could be?

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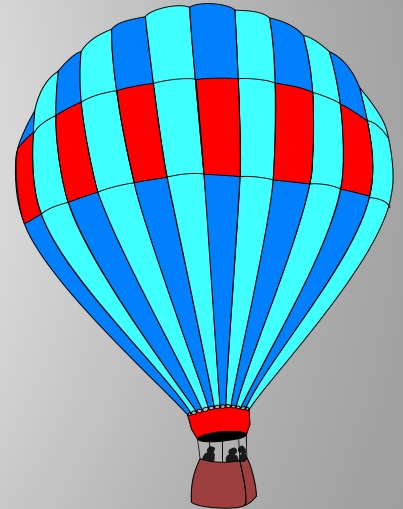
Estate and Legacy Preservation Planning

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Is Your Estate Planning all it Should be
or Could be?

Who needs Estate Planning?

Is your Estate Planning all it should be
or could be?

When and How should your Estate
Planning be updated?

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or Could be?

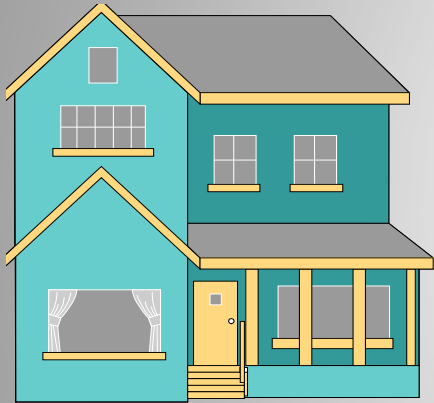
Who needs Estate Planning?

Caring for loved ones as if you were
still there

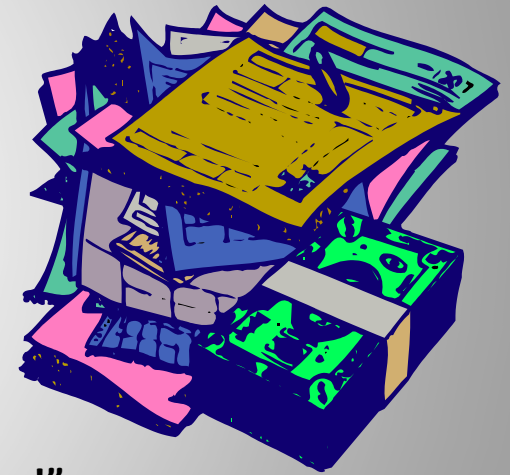
- With your resources
- With your love
- With your wisdom

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Who needs Estate Planning?



EVERYONE!



“If you don’t have a plan for your estate, the State does!”



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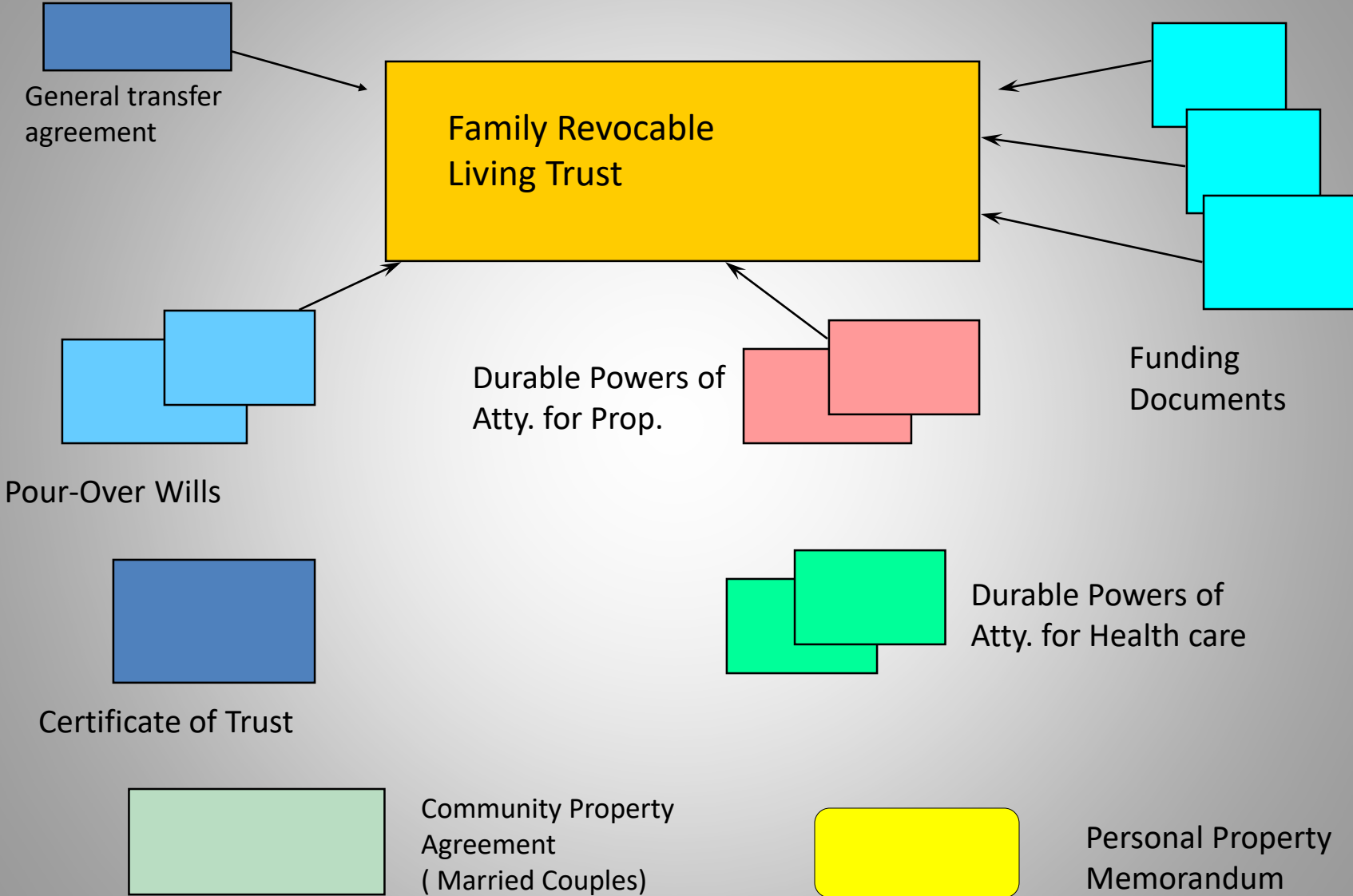
- Can you read it?
- Do you understand it?
- Does it clearly tell your Family your wishes?
- Does it convey your Legacy?
- Was it done by a qualified
Estate Planning Attorney?

Watch out for cheap Estate Planning. (even by Attorneys)

They know what their services are worth...

Required Documents.....

Associated Documents



Is Your Estate Planning all it Should be or Could be?

When and How should your Estate Planning
be updated?

- At least every two years (maybe less)
- Changes in your Family
- Changes in your assets
- Changes in your plans
- Changes in the laws
- Powers of Attorney and financial institutions

The Next Step



- Complete Estate Planning Worksheet
- Seek Competent Legal Counsel
- Pauly Law Offices
- 916-207-7526