

We believe everyone needs an estate plan. While crafting an estate plan might seem like a daunting task, it doesn't have to be. To get started, you need to make a few choices. Let's explore.

### **WHO WILL BE IN CHARGE?**

An important element in any estate plan is the selection of your fiduciaries – the person or persons you would like to make health care decisions on your behalf (called a health care representative), to make financial and other non-health-care decisions (called an attorney-in-fact), and to be in charge of settling your estate

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First choice

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First choice

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Second choice

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Second choice

**WHAT ARE YOUR WEALTH TRANSFER GOALS?**

Your wealth transfer goals might be achieved through a combination of a last will and testament, a revocable trust, beneficiary designations, asset titling and more. However, you don't need to get bogged down in the details right away. Rather, think broadly about how you would like your assets to pass to your heirs. For example, if you are married, would you like your spouse to inherit all your assets before your children? Would you prefer that your children not receive an inheritance until a certain age? Do you have any charitable legacies that you would like to fulfill? What about leaving a legacy for grandchildren and other future generations? List your ideas here.

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The information regarding estate planning should not be construed as tax or legal advice and is for general informational purposes only. Neither Edelman Financial Engines nor its affiliates offer tax or legal advice. Interested parties are strongly encouraged to include your qualified tax and/or legal professionals in these discussions and decisions to help determine the best options for your particular circumstances.

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