

BECOMING A CONFIDENT MONEY MANAGER

STEP SEVEN PROTECT YOUR ASSETS AND WEALTH

Every confident money manager knows how essential estate planning is for their family. They make sure their assets go where they intend for them to go when they are no longer around. Your planning relieves your loved ones from carrying the burden of chaos and disorganization.

WILL

I HAVE A WRITTEN AND NOTARIZED WILL AND MY FAMILY KNOWS ITS LOCATION.

INSURANCE

I HAVE ADEQUATE LIFE INSURANCE AND MY LOVED ONES KNOW THE POLICY INFORMATION.

OTHER DOCUMENTS

I HAVE A LIVING WILL.
I HAVE A REVOCABLE LIVING TRUST.
MY BANK ACCT/PASSWORDS ARE LOCATED IN A SAFE AND ACCESSIBLE LOCATION.

WHAT DOCUMENTS DO YOU NEED TO CREATE?

Put all of your documents in a safe location and share the location with a trusted friend/family member.