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The Legacy Planning Packet

Estate attorneys are not the only ones who can assist you in estate planning, Financial Planners play a big role in the process too. It does not matter how much or how little you have; estate planning is vital when it comes to your loved ones. Financial Planners provide that second look over your estate planning documents, they help keep your beneficiary designations up to date, and most importantly, they help you understand the financial impacts that arise from your decisions and life choices.

Many clients are reluctant to talk about their death or incapacity with their family members. Failure to plan in the event of your death contributes even more emotional turmoil to an already traumatic event, leading to conflict over the lack of information provided to make basic decisions. Therefore, we have created the Family Love Letter to help you, and us, provide adequate guidance of your assets, liabilities, and intents for your loved ones. It is wise to have a written document like this one to fulfill your final wishes. The Legacy Planning Packet contains two sections, one for your family, and the other for your Power of Attorneys.

The Family Love Letter is used to address details that are easily overlooked but important for family members to know. It will contain information such as your final wishes, special requests, and your family history. The Power of Attorney Letter addresses financial matters in detail, and we recommend for you to keep it in a safe place, as it will contain confidential information. Please note that these documents are not legally binding, and we urge you to consult with your attorney to verify that the financial and medical preferences expressed in these documents are consistent with the legal documents they have or will execute. Our hope is that by utilizing The Legacy Planning Packet, your wishes and intents will be made known.

Thank you.

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Navigate Financial does not provide legal or tax advice. You should consult a legal or tax professional regarding your individual situation.