



## CUSTOMIZATION + CONFIDENCE

From the finite details to the final signing, we take care of everything! Not only do you keep all five original documents, we provide secure storage in your online client portal

# YOUR ESTATE PLAN

PEACE OF MIND // PROTECTION

Our comprehensive estate plans give you more than you expect and everything you need. We include five completely customized documents written just for you:

- **Medical Power of Attorney:** This document allows us to appoint a person who will act as your agent and make medical or health care decisions for you if you become injured or sick and cannot make those decisions yourself.
- **Statutory Durable Power of Attorney:** This document allows us to appoint a person who will act as your agent and make financial decisions for you if you become injured or sick and cannot make those decisions yourself.
- **Physician's Directive:** This document tells your health care providers whether you want to be kept on life support or not. We have a general version we can use or we can tailor it specifically to any personal or religious beliefs you may have.
- **HIPAA Release:** This document authorizes specific people to access your otherwise protected health information. This helps your agent have access to the information he or she needs to make medical decisions for you if and when needed. It is also very useful if you ever just need help from family with doctor's appointments and other healthcare decisions.
- **Last Will + Testament:** This document becomes applicable after you die. It states specifically who gets your property when you die. We also use this document to appoint an executor. This is the person responsible for following through with your wishes. We can use the Will to create testamentary trusts to hold property for your children or others, appoint guardians for your children if necessary, and make specific designations for property you may have (for example, "all of my art work goes to my daughter").

ALREADY HAVE A WILL AND NEED A REVIEW? ONLY NEED  
SUPPLEMENTARY DOCUMENTS? WE CAN HELP! CALL US AT (210) 686-4482.