

FAMILY AFFAIRS CHECK-UP

One missing piece could cost your family \$20,000 and decades in the probate system. Anything missing below? Then it's time for an update. We recommend annual reviews. Give us a call to get yours done: [\(754\) 757-2447](tel:7547572447)

MEDICAL

DON'T LET A JUDGE DECIDE YOUR HEALTH

- NAMES PRIMARY & BACKUP AGENTS
- INCLUDES "MENTAL HEALTH" POWERS
- INCLUDES NURSING HOME POWERS
- INCLUDES HIPAA PRIVACY PROTECTIONS



FINANCIAL

DON'T LET LAWYERS CONTROL YOUR MONEY

- POA NAMES ONE PRIMARY & TWO BACKUP AGENTS
- PROTECTS ASSETS FROM NURSING HOME EXPENSE
- PREVENTS POA FROM STEALING FROM YOU
- DESIGNATES AN EXTRA "EMERGENCY AGENT"



ESTATE

MAKE IT SIMPLE FOR YOUR FAMILY

- PROTECTS IRA FROM 30% INCOME TAX
- KEEPS ASSETS IN THE FAMILY
- PROTECTS FROM CREDITORS, LAWSUITS, AND DIVORCE
- SAVES THE 50% ESTATE TAX
- AVOIDS PUBLIC RECORDS & LENTHY PROBATE

