

LUNCH & LEARN AGENDA



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What is a good Estate Plan?

- Last Will and Testament
- Revocable Trust
- Durable Power of Attorney
- Health Care Power of Attorney
- Living Will – Advance Directive
- HIPAA Authorization

What else should you do?

- Plan for the unexpected
- Have a contingency plan
- Update beneficiary designations
- Fund your revocable trust if you have one
- Update estate planning if you move to another state, divorce or remarry
- Pre-need plan for funeral services