



Estate Planning: How to Plan for Your Future

Step #1

Identify the best estate plan for you

Foundation Plan	Living Trust Plan
<ul style="list-style-type: none"> • Comprehensive Will • Health Care Power of Attorney • Living Will (if desired) • Financial Power of Attorney • Health Care Consent for Children (if needed) 	<ul style="list-style-type: none"> • Revocable Living Trust • Comprehensive Will • Health Care Power of Attorney • Living Will (if desired) • Financial Power of Attorney • Health Care Consent for Children (if needed)

Step #2

NC Planning prepares and files all documents for your estate plan

Comprehensive Will <ul style="list-style-type: none"> • The key document after you pass away • Allow your Executor to collect and distribute property exactly how you desire • Guardian(s) for your children 	Health Care Power of Attorney <ul style="list-style-type: none"> • Allow trusted person to make health care decisions for you if you are unable during life 	Financial Power of Attorney <ul style="list-style-type: none"> • Allow trusted person to manage your finances for you if you are unable during life 	Revocable Living Trust <ul style="list-style-type: none"> • Separate legal entity created to own or receive property • You control assets within your trust during lifetime • Avoid cost and time delay of public probate
	Health Care for Child <ul style="list-style-type: none"> • Allow trusted person to make health care decisions for your child during your life 	Living Will <ul style="list-style-type: none"> • State your wishes regarding artificial life-sustaining care 	

Step #3

Maintain relationship with NC Planning and update your plan as your life changes



The NC Planning team understands that things in life change over time. Communication is key in creating and preserving a strong estate plan. NC Planning will be here for today's planning and in the future to ensure that your needs and the needs of your loved ones are always given the attention they deserve.