



Luck favors the prepared... even in death.

For the record, we are holding out hope that you will be the first to stay forever young and healthy. But just in case your retirement ends like every other human, we want you to be prepared, at least financially, so that when the time comes, we can work with your beneficiaries to ensure your wishes are fulfilled. Below you will find how your assets will be directed after your passing. This is something we will review together during our next meeting, but please don't hesitate to call or email with any questions, concerns and/or changes.

Distributed according to your estate documents:

- ✓ Real estate (including home)
- ✓ Vehicles
- ✓ Personal belongings
- ✓ Most bank accounts
- ✓ Non-retirement investment accounts
- ✓ Anything that does ***not*** have a listed beneficiary

According to our records, this bucket will be distributed based on your will/trust last updated:

Per your beneficiary agreements

- ✓ IRA accounts
- ✓ ROTH IRA accounts
- ✓ Life Insurance
- ✓ Annuities
- ✓ Transfer on Death (TOD)
- ✓ Anything that has a listed beneficiary

This bucket will be distributed based on the beneficiaries listed on each account (e.g. Fidelity).

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During our next meeting we can walk through this together.



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information is for illustration only. Estate planning is complicated and should involve your attorney and accountant.