



Estate Planning: Your Values, Your Legacy - Let Your Values Guide Your Plan

An estate plan reflects who you are, not just what you own. Think about the people and causes that matter to you when creating your plan. Your assets can help secure your family's future or support organizations you believe in, turning your values into a meaningful legacy.

Make Your Final Wishes Clear

Leaving clear instructions about your final arrangements gives your loved ones peace of mind during a difficult time. Consider including:

- Burial or cremation preferences
- What kind of memorial service you'd like
- Where you'd want memorial donations directed

You might choose to pre-pay for these arrangements. If you do, make sure your executors know about these plans and can find the necessary paperwork. Keep these instructions with your other estate planning documents so they're easy to locate.

Talk About Your Plans

A good estate plan helps avoid legal complications, reduces taxes, and clearly communicates your intentions.

Having open conversations with your family about your decisions can make things easier later. By explaining your choices now, you can answer questions and potentially prevent future disagreements. Make sure your loved ones know who your key contacts are and where to find important documents when they need them.