



Create a lasting legacy

We're proud to help you and your family create your estate plan through our partnership with Estate.ly



Why do I need an estate plan?

An Estate Plan assures your wealth goes to the ones who matter.

- ✓ **Protect What Matters**
Ensure the safety and care of the people, pets, and communities you cherish.
- ✓ **Ease for Loved Ones**
Offer your family a clear plan and reduce complications by detailing how your estate should be managed.
- ✓ **Security and Peace of Mind**
Protect your loved ones and assets, no matter what, and minimize burden on your family.

How do we help?

Cloudbooks+ & Estate.ly make estate planning easy.

- ✓ Navigate estate planning with Estate.ly's intuitive solutions, tailored to common needs.
- ✓ Craft a will or a trust, plus other essential documents like a financial power of attorney and advance healthcare directive.
- ✓ For intricate situations, easily pair with a specialized attorney.

What comes next?

Creating your Estate Plan

Step 1

Choose your estate plan type

Step 2

Create & customize your documents

Step 3

Print & sign your documents

Step 4

Store & share with loved ones

Will-based Plan

Personalized, state-specific plan for your assets, children, medical care, and final arrangements.

Documents included:

- ✓ Last Will & Testament
- ✓ Financial Power of Attorney
- ✓ Healthcare Directive
- ✓ HIPAA Authorization

Trust-based Plan

All of the coverage of a Will, plus the benefit of avoiding probate to reduce family burden.

Documents included:

- ✓ Revocable Living Trust
- ✓ Pour-over Will
- ✓ Financial Power of Attorney
- ✓ Healthcare Directive
- ✓ HIPAA Authorization

Incapacity Only

Choose when individuals are able to act on your behalf

Documents included:

- ✓ Financial Power of Attorney
- ✓ Healthcare Directive
- ✓ HIPAA Authorization

What does an Estate Plan include?

Legal documents to give you peace of mind, forever.

- The Last Will and Testament / Revocable Living Trust documents key decisions about your assets and children
- The Financial Power of Attorney lets you choose who makes financial decisions for you
- The Advance Healthcare Directive lets you choose when loved ones can make medical decisions for you
- The Beneficiary Plan helps you organize assets distributed outside of your will or trust
- Access documents forever with unlimited updates





Peace of mind that lasts a lifetime

Embark on a journey of securing your future and making a difference. Start today.

Quick Facts About Estately

1M+

Individuals have mapped out their estate plans with Estately

4.9 / 5.0

Highest rated on TrustPilot for user-friendly estate planning

1,500+

Top-tier nonprofits and financial institutions use their products

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