

PRE-RETIREE & RETIREE WORKSHOP

What Families Often Miss

The most common gaps in estate plans — and the simple steps that close them before they become problems.

FAMILY. FINANCES. FUTURE.

THE REALITY

Good Documents Aren't Enough

Most families have done something. Very few have made sure those pieces still work together. Here is where things slip.

GAP ONE

Beneficiaries

Beneficiary designations override your will. Outdated ones are the single most common — and most costly — coordination failure.

Trust Funding & Powers Of Attorney

A trust that isn't funded does nothing. A missing or outdated power of attorney can freeze a family at the worst possible time.

Executors & Family Communication

The right executor — and a family that actually understands the plan — turn a stressful season into a manageable one.

- Choose the right executor
- Document where things are
- Talk as a family, early

START WITH CLARITY

The Estate Score™

Find your own gaps in minutes. A clear, personalized look at what's coordinated — and what isn't.

DISCUSSION

Questions

Open the floor. What questions do you have about your own plan?

THE NEXT STEP

A Private Review

We'll help you close the gaps and bring your plan into coordination — calmly and confidentially.