

COMMON ESTATE PLANNING MISTAKES TO AVOID

- 1. Lack of planning
- 2. Unorganized finances
- 3. Not having a will, trusts, durable power of attorney, and a advance healthcare directive
- 4. Having out-of-date estate plan documents
- 5. Having “do-it-yourself” wills and trusts / no second opinion
- 6. Not selecting backup executors, trustees or guardians
- 7. Not coordinating your life insurance & retirement plan beneficiaries with your estate plan
- 8. Not coordinating your life ins. ownership with your estate plan
- 9. Not coordinating property titles with your estate plan
- 10. Not having enough of the right kind of insurance
- 11. Not providing executors & trustees with a location sheet
- 12. Procrastination

October 16-22th is the 9th Anniversary for National Estate Planning Awareness Month / Week

Join the leading financial service associations and nearly over 1,000,000 financial service professionals by supporting and participating in a concentrated national financial awareness media campaign



To learn more about the campaigns visit

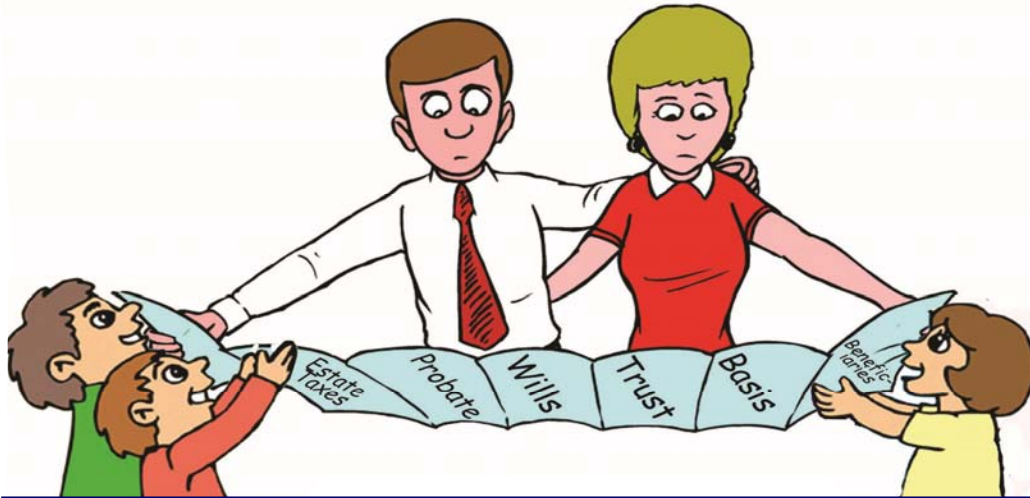
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April is the 13th Anniversary for National Financial Literacy Month

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