



## April 14<sup>th</sup> Anniversary of National Financial Literacy Month

In support of National Financial Literacy Month and the Improving Financial Awareness & Financial Literacy Movement here are some



### 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 Having out-of-date estate plan documents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

Protect you and your family by making sure your estate and financial plans are up-to-date by visiting your professional advisors.




**The Financial Awareness Foundation**  
*Improving financial awareness & financial literacy<sup>SM</sup>*  
[www.TheFinancialAwarenessFoundation.org](http://www.TheFinancialAwarenessFoundation.org)



## October is the 10<sup>th</sup> Anniversary of National Estate Planning Awareness Month / Week

In support of National Estate Planning Awareness Month / Week and the Improving Financial Awareness & Financial Literacy Movement here are



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