

Appointment GUIDE

To prepare for your appointment, please be ready to provide the following information:

Who would you name to raise your minor children upon your death?

First Choice

Second Choice

Who would you appoint to make healthcare decisions for you in the event you are unable to do so yourself?

First Choice

Second Choice

Who would you appoint to pay your bills, write checks, etc. in the event you are unable to do so yourself?

First Choice

Second Choice

Who would you name to distribute your personal property and assets upon your death?

First Choice

Second Choice

IMPORTANT: Be sure to consider who you want to receive your personal property and assets upon your death.

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SMART ESTATE PLANNING SOLUTIONS

SMART ESTATE PLANNING

MADE SIMPLE

INCLUDED WITH YOUR ESTATE PLAN:

one plan covers you, your spouse and minor children

- Last Will and Testament
- Revocable Living Trust (if required)
- Comprehensive Asset Funding Guide
- Financial Power of Attorney
- Living Will/Advance Healthcare Directives
- Healthcare Power of Attorney
- HIPAA Authorization
- No Cost Updates and Revisions to Plan Documents



Attorney Assigned to Your File

If your situation is complex, we'll connect you with a qualified estate planning attorney for a free consultation at no additional cost.



Secure Online Storage

Your documents are securely stored in the cloud at no additional cost. Easily access, share or deliver documents 24/7/365 with important people in your life or professionals and organizations during emergencies.



Satisfaction Guaranteed

If you are not satisfied with every aspect of your estate planning experience, we'll refund 100% of your money, no questions asked!



SMART ESTATE PLANNING SOLUTIONS

Step

1

Schedule an Appointment

Visit www.thoughtfuladvisors.com or use our online scheduler www.calendly.com/garyloduca to set your no cost estate planning review meeting.

2

Complete the Appointment Guide

To ensure that your meeting is effective, please complete the appointment guide. The guide is located on the back of this brochure.

3

Meet with Your Advisor

Remember to bring your appointment guide so that the decisions you have made are readily available.



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