ASCENTIAL WEALTH ADVISORS

Organize Your Important Information

A gift of clarity for your loved ones

Planning for the end of your life, and having conversations with loved ones about your final wishes and financial matters, can feel uncomfortable. It is natural to want to put these discussions off, but taking the time to plan and organize things now may be one of the most valuable gifts you ever give yourself and your loved ones.

WHY ORGANIZATION IN ESTATE PLANNING MATTERS

Our team has extensive experience guiding clients and their loved ones through the complex transitions that follow a death or incapacity event. Over the years, we have encountered a wide range of circumstances and varying levels of organization of essential estate planning documents.

Our experience has shown that when key documents are organized and accessible, it greatly reduces stress, delays, and unnecessary expenses. Proper preparation helps loved ones to step in confidently, address immediate needs, and carry out legacy plans with clarity and efficiency.

Starting the conversation:

A little reassurance might help. Consider opening with "Hey guys, I'm not planning on going anywhere for a long time, but I do want you to be ready for when that day comes."

ASCENTIAL WEALTH ADVISORS ESTATE PLANNING ORGANIZER

With this in mind, we have created an Estate Planning Organizer designed to help you consolidate critical documents and important information. This centralized resource can simplify communication of your plans and wishes, provide clarity, and reduce stress during challenging times; empowering your loved ones to act confidently and honor your wishes.

The organizer is designed to give you both structure and flexibility, with space to include as much or as little information as you choose. We understand that everyone's preferences and circumstances are unique, so we designed this resource to be adaptable to your needs. You can add details where they matter most to you and skip sections that aren't relevant. Any information you share with a trusted person will make a meaningful difference and help ease the process of carrying out your wishes.

ESTATE PLANNING ORGANIZER CONTENTS:

- *Sections:*
  - *Personal details*
  - *Important contacts*
  - *Final Wishes*
  - *Legal Information*
  - *Financial Accounts*
  - *Insurance Information*
  - *Real Estate and other Property*
- *Folder pockets for critical documents like:*
  - *Wills or Trusts*
  - *Power of Attorney*
  - *Incapacity Documents*
- *Optional form pages to provide more details like:*
  - *Pet Instructions*
  - *Family History*
  - *Incapacity Contacts & Instructions*
  - *Ethical Will*

We recommend reviewing and updating your information periodically, especially after major life events such as marriage, divorce, birth, or death. We hope this organizer serves as a helpful tool for communicating your plans and wishes with those closest to you. It can also serve as a starting point for important conversations about estate planning, whether for your own needs or in situations where you may need to step in for someone else, such as aging parents, other family members or friends, or adult children.

Our team is here to assist you throughout this process. If you have not yet received an organizer from your financial advisor, they will discuss it with you during your next review meeting. If you would like to begin working on your organizer sooner, please reach out to our team to request one.

If you prefer to complete forms electronically, we can provide fillable PDF versions. Once completed, we can save a copy of the forms to your file with us and also print and prepare the pages for your organizer. For security purposes, we recommend storing electronic copies in a protected location, such as an encrypted computer or external drive, and saving a copy to the Raymond James Vault.

11 E Superior St, Suite 500 | Duluth, MN 55802 | 218.336.2500 | ascentialwealth.com