

What Estate Planning Documents Do I Need?



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Everyone needs three (3) basic documents: (1) a Will to govern the distribution of assets titled in your name alone; (2) a Power of Attorney which appoints a trusted individual to act as your agent to step in and assist you with financial matters; and (3) a Healthcare Proxy which appoints an agent to make healthcare decisions for you if you become incapacitated. From there, depending on your specific needs, you may contemplate other legal instruments such as trusts.

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