



women wealth & wellness

Women empowering women to maintain a healthy, balanced lifestyle

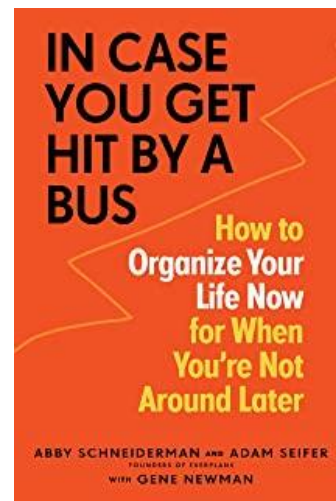
This month we'll focus on estate planning. Many women say, "I don't need to worry about that." For some reason they don't feel they have too much of an estate that matters. Listen ladies, it does matter - no matter where you are on the level of wealth. It's not just a matter of assets. It's also to protect your loved ones and to ensure your wishes when you're not around.

Let's check in with the basics. Is your will up to date? Do you have a Power of Attorney and a health care directive? If you answered no to any of those, get out the pencil and put it on your immediate to do list!

The second part of your estate is also thinking about how the things you own are titled, including your life insurance. It all adds into your estate and could put in a category you may not have considered. Think about accounts that don't have beneficiaries associated with it. Perhaps you need to put a transfer or a payable on death designation to them in order to minimize your probate estate.

Join me this month on the 28th to connect over coffee and answer questions on these important topics. Estate planning attorney Tara Frame will be joining me to answer questions as well.

Here is the book I'm working through this month. Would love to discuss it with you!



Reflections:

1. What small step do I need to take in terms of my estate? Do I need to revisit updating my will?
2. Spend some time thinking of what your wishes are for your loved ones when you have passed.
3. Are my beneficiaries up to date?
4. Are all of my assets documented and titled correctly?

Take care of yourself,
Elaine