How your documents work together

While you are living

CHILDREN

Guardian
Who raises your children if you cannot.

Power of attorney for finances
Who handles the money your children need.

HEALTH

Health care power of attorney and HIPAA release
Who makes medical decisions and can see your records when you cannot speak for yourself.

Health care directive
Your wishes on care, pain relief, life support and organ donation.

MONEY

Power of attorney for finances
Who manages what is in your own name if you cannot.

Trust
Who manages what is in the trust, and how it is used for you for the rest of your life.

After you pass

CHILDREN

Guardian
Who raises your children.

Trustee or executor
Who manages what your children receive, and when.

HEALTH

Health care directive
Your wishes on organ donation, burial or cremation, and the service.

MONEY

Trust
What happens when the first spouse passes, where things go after you are both gone, and how each person receives their share.

Pour over will
Sends anything left outside the trust into it.

General transfer
Catches what was meant for the trust.

We are the bridge, not the attorneys.

We streamline the process for both sides. We gather your information with you and walk you through each choice, so the attorneys and the rest of the team can review it quickly, and every plan has a human review. Every plan is real and customized to you and your family, without the direct cost of attorneys and on your own timeline. You keep more control of the process, without the hassle.

Start with a free conversation.

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We are not a law firm and do not give legal advice. Your documents are customized to you and reviewed by certified estate planners and paralegals. An attorney review is available in most states.