Will or trust? Side by side

A quick look at what each choice does. Which one fits depends on your family, and we walk through it with you.

	No plan	Beneficiary forms only	Powers of attorney only	Will-Based Package	Trust-Based Package
Skips probate court					☒
Names who receives what		☒		☒	☒
Health care directive and powers of attorney			☒	☒	☒
Names a guardian for your children				☒	☒
Someone can act right away					☒
A share can wait until an age you choose					☒
Works if you cannot decide for yourself			☒	☒	☒
Can provide for a family member with special needs					☒
Easy to update			☒	☒	☒
Keeps your plan private			☒		☒
Avoids a second court case for a home in another state					☒

The gold columns are our two packages. A general guide, not legal advice.

Start with a free conversation.

Call or text (980) 304-1500
wealthbuilders-insurance.com/go/estate

Chaka A. I. Ali, Licensed Managing Financial Strategist
Call or text (980) 304-1500
wealthbuilders-insurance.com

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.