



April 12th Anniversary of National Financial Literacy Month

In support of Improving Financial Awareness & Financial Literacy
here are some



COMMON ESTATE PLANNING MISTAKES TO AVOID

- 1. Lack of planning
- 2. Unorganized finances
- 3. Not having a will, trusts, durable power of attorney, and a advance healthcare directive
- 4. Having out-of-date estate plan documents
- 5. Having “do-it-yourself” wills and trusts / no second opinion
- 6. Not selecting backup executors, trustees or guardians
- 7. Not coordinating your life insurance & retirement plan beneficiaries with your estate plan
- 8. Not coordinating your life ins. ownership with your estate plan
- 9. Not coordinating property titles with your estate plan
- 10. Not having enough of the right kind of insurance
- 11. Not providing executors & trustees with a location sheet
- 12. Procrastination

Protect you and your family by making sure your estate plans are up-to-date by visiting your financial & estate planning professional advisors.

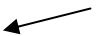


www.TheFinancialAwarenessFoundation.org

The Financial Awareness Foundation

Improving financial awareness & financial literacySM

Place your
Logo here





October 8th Anniversary of National Estate Planning Awareness Week (17-23)

In support of Improving Financial Awareness & Financial Literacy
here are some



COMMON ESTATE PLANNING MISTAKES TO AVOID

- 1. Lack of planning
- 2. Unorganized finances
- 3. Not having a will, trusts, durable power of attorney, and a advance healthcare directive
- 4. Having out-of-date estate plan documents
- 5. Having “do-it-yourself” wills and trusts / no second opinion
- 6. Not selecting backup executors, trustees or guardians
- 7. Not coordinating your life insurance & retirement plan beneficiaries with your estate plan
- 8. Not coordinating your life ins. ownership with your estate plan
- 9. Not coordinating property titles with your estate plan
- 10. Not having enough of the right kind of insurance
- 11. Not providing executors & trustees with a location sheet
- 12. Procrastination

Protect you and your family by making sure your estate plans are up-to-date by visiting your estate planning professional advisors.



www.TheFinancialAwarenessFoundation.org

The Financial Awareness Foundation

Improving financial awareness & financial literacySM

Place your
Logo here

