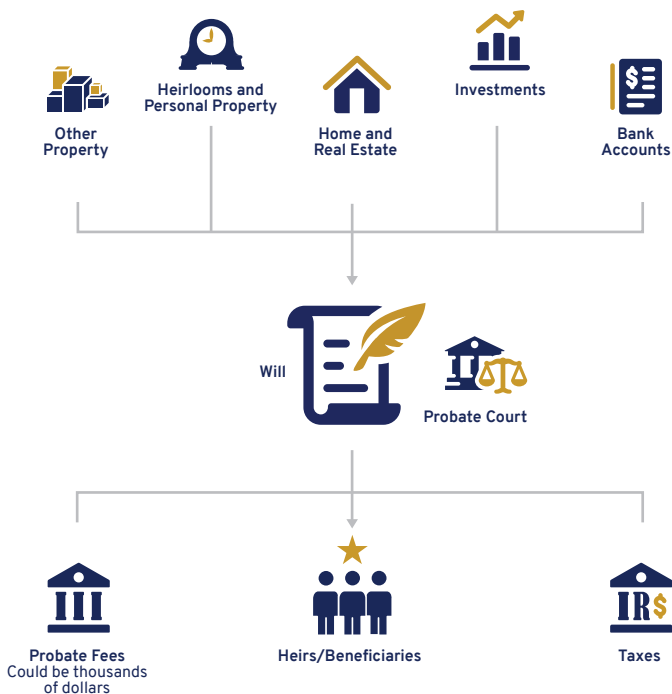


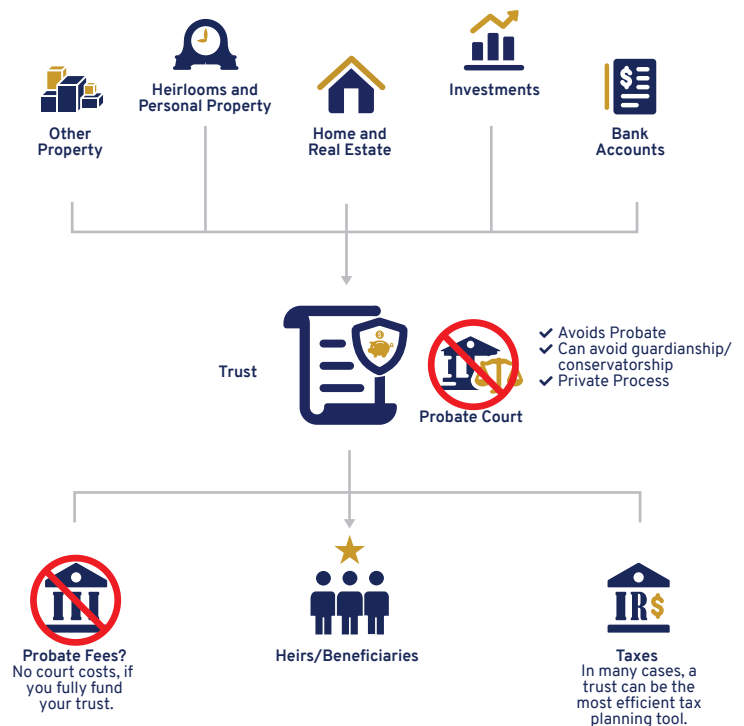
HOW YOUR ESTATE WORKS WITH A WILL AND A TRUST



How Your Estate Works With a Will



How Your Estate Works With a Funded Trust



What is probate and guardianship/conservatorship?

Probate is the legal process whereby a court “wraps up” your affairs after you die. Guardianship or conservatorship can occur if you become unable to manage your own affairs due to disability or incapacity and results in a court controlling your financial and medical decisions.

What about living wills?

A living will is for medical affairs and lets others know your wishes about life support in terminal situations. A will or trust is for financial affairs. You usually need both documents to have a complete estate plan.

What does it mean to fund my trust and why is that important?

Funding your trust is vitally important. When you fund your trust, you transfer legal ownership of your accounts and property into your trust. As a result, when you die or if you become unable to manage your own affairs, then you legally own nothing on paper—meaning the courts have nothing to takeover and control! Don’t worry—you can keep using everything you own as you always have.

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