



SIGNING EDGE

LAW FIRM

Protecting Families. Preserving Legacies.



A SIMPLE GUIDE TO GETTING STARTED

Protect what matters. Provide for the people you love. Plan with confidence.

Estate Planning: Where Do I Start?

If you've been thinking about estate planning but aren't sure where to begin, please keep in mind that you're not alone. Many people know they should have an estate plan but don't know what steps to take first. The good news is that getting started is usually much simpler than people think.

Step 1: Think About Three Questions

1. If you became unable to manage your affairs, who would you trust to handle your finances?
2. If you could not communicate with doctors, who would you trust to make medical decisions for you?
3. If something happened to you, who would you want to receive your property?

Don't worry about having perfect answers. Just start thinking about the people you trust.

Step 2: Make a Simple List

Gather basic information about:

- Your home or real estate
- Bank accounts
- Retirement accounts
- Life insurance
- Vehicles
- Any existing estate planning documents

**You do not need every document before speaking with an attorney.
A basic list is enough to get started.**

Step 3: Identify Key People

Consider who you would want to serve as:

- Personal Representative (the person who would handle your estate)
- Financial Decision-Maker
- Health Care Decision-Maker
- Guardian for minor children, if applicable

The important thing to remember:

- **Choose people who you can trust,**
- **who you see as a responsible person; and**
- **also willing to serve.**

Step 4: Meet With an Estate Planning Attorney

A consultation is your opportunity to ask questions and learn about your options. It does not require you to know exactly what documents you need.

Good questions to ask include:

- What documents do you recommend for my situation?
- How are your fees structured?
- What is included in your fee?
- What information should I gather?
- What should I expect during the process?

Asking questions is a great way to:

- **make sure that you are getting what you need; and**
- **that you are hiring the right attorney.**

Step 5: Remember That Estate Planning Is Not Just About Death

Estate planning also helps answer important questions during life, such as:

- Who can help manage finances if I become incapacitated?
- Who can communicate with my doctors?
- How can I make my wishes known?

Many people benefit from estate planning even if they are not wealthy, do not own a business, or do not have children.

The Good News: You Don't Have to Figure Everything Out Before You Start

The biggest mistake many people make is waiting until they have all the answers.

You don't need all the answers.

You just need to take the first step.

5 SIMPLE STEPS TO GET STARTED

1



THINK ABOUT THREE QUESTIONS

Who would handle your finances? Who would make medical decisions? Who would receive your property?

2



MAKE A SIMPLE LIST

List your assets, accounts, insurance, vehicles, and any existing estate planning documents. You don't need everything—just a start.

3



IDENTIFY KEY PEOPLE

Choose people you trust to serve in important roles, such as personal representative, financial decision-maker, health care decision-maker, and guardian (if applicable).

4



MEET WITH AN ATTORNEY

Ask questions, learn your options, and understand the process. It's your opportunity to find the right attorney for you.

5



REMEMBER: IT'S ABOUT LIFE, TOO

Estate planning helps you prepare for the unexpected and ensure your wishes are known, during your life and beyond.



YOU MAY BENEFIT FROM ESTATE PLANNING IF:

- You own a home.
- You have children.
- You have retirement accounts.
- You want someone to make medical decisions if you cannot.
- You want someone to manage finances if you cannot.
- You want to reduce uncertainty for your family.



WHAT ABOUT COST?

Estate planning can often be completed in stages. You do not necessarily need every possible document or strategy to get started. We will help you create a plan that fits your needs and budget.



THE GOOD NEWS: YOU DON'T HAVE TO FIGURE EVERYTHING OUT BEFORE YOU START.

The biggest mistake many people make is waiting until they have all the answers. You don't need all the answers. You just need to take the first step.



E-mail james@signingedge.com for a more comprehensive Missouri Estate Planning Guide or to let us know of any questions you have.



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