

Essentials Package

The documents every adult should have: simple, fast, and legally valid.

Best for

- Young adults just getting started
- Anyone who doesn't own a home or have children yet
- People who want basic protection in place without complexity
- First-time estate planning clients

Not included in this package

- Revocable living trust
- Pour-over will or certificate of trust
- Advanced tax planning structures

Talk to your advisor if you think you may need additional documents. They can recommend the right package for your situation.

What you'll create

Document	What it does
Financial Power of Attorney	Names someone to manage your finances if you become incapacitated.
Healthcare Advance Directive	Documents your wishes for medical care if you can't speak for yourself, including end-of-life decisions.
HIPAA Authorization	Allows your named person(s) to access your medical information and communicate with healthcare providers on your behalf.

What happens after?

Once you complete the online questionnaire, your documents are prepared and available to download within a few business days, or you can pay to have them printed and shipped directly to you. You'll then print them, sign in front of a notary in accordance with the requirements of your state, and return a copy to your advisor, who will keep them on file as part of your ongoing financial plan.



Estimated time to complete: Approximately 10–15 minutes.