

Will Package

A complete foundational plan: everything you need to protect yourself and the people you love.

Best for

- Adults at any stage of life who want a complete foundational plan
- People with assets, a partner, or anyone they'd want to make decisions for them
- Clients who want full legal coverage without a trust
- Anyone taking estate planning seriously for the first time

Not included in this package

- Revocable living trust (helps assets avoid probate)
 - Pour-over will and certificate of trust
 - Advanced tax planning structures
 - Credit-shelter or spousal trust provisions
- 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
Last Will & Testament	Names who receives your assets and who cares for dependents. The cornerstone of any estate plan.
Financial Power of Attorney	Names someone to manage your finances (pay bills, access accounts) if you become incapacitated.
Healthcare Advance Directive	Documents your wishes for medical decisions if you're unable to communicate them yourself.
HIPAA Authorization	Grants your named person(s) access to your medical records and the ability to speak with your healthcare team.

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 30–45 minutes.
This package covers the four documents most advisors recommend as the baseline for any adult.