



What is
“Estate
Planning”?
And does my
family need it?

Why is “Estate Planning” important for me and my family?

Every Family is unique—

So is yours.

Estate Planning should be personalized for you.

Here are some typical family scenarios we see every day.



You may have a Blended Family



Many families often have children from other relationships we help protect your kids!

Child with Special Needs



We can help protect her future with a variety of techniques.

Young Adult Driving Your Car



We may help you protect your assets from your kid's mistakes

A Life Partnership or unmarried couple will need special advice and arrangements



An Aging Parent needs special protection as well



You may be newly married seniors



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Your adult children
may be getting
married and
starting their own
families



A young family or a family with adult children heading for college or getting married.....

At each stage of your life... you need to make sure you and your family are taken care of. We never know when the unexpected will occur.



Proper planning
is a must for
families of all
types and ages.

We can help you
protect
whomever you
love from life's
uncertainties
and changes.





My goal is to plan now-

Our future is filled with potential **complicated financial and health** issues. You need to make sure you have the appropriate legal documents in place-

In **advance** of a crisis-

we make sure your family has all tools to make sure **you** are taken care of ...

and that **they** are taken care of as well.



If your family is currently undergoing a **crisis situation**, either financial or medical,

I work with you to find solutions to enable your family to move forward.

What will my Estate Plan look like?

In my office, we provide a binder of signed documents similar to this one.

Organization is Key!!



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1	Living Trust Agreement
2	Certificate of Trust
3	Funding Instructions
4	Last Will & Testament
5	Durable Power of Attorney
6	Designation of Health Care Surrogate
7	Living Will
8	Authorization for Release of Protected Health Information
9	Memorial Services
10	Personal Effects

We're here to help!

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JakobLegal Team

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We look forward to meeting you