

TREASURER'S TIP: ESTATE PLANNING

Estate planning is the process of organizing, evaluating and planning what to do with your assets in the event of your death or incapacitation. You can start planning by yourself, or you can invest in the help of a variety of professionals. No matter which route you take, careful planning of your estate can help prevent your assets from becoming unclaimed. I know it can feel overwhelming to think about, so I've provided tips to help get you started.

1. Make a timeline for yourself. By starting early in the year, you might find it feasible to complete your estate planning by the year-end holiday season. Many of us are spending the most time with loved ones during the holidays, so you can plan to discuss your estate with them then.
2. If you would like the help of professionals, start doing research on the individuals and/or firms you would like to use. Whether that's an attorney, estate tax professional or life insurance advisor, find time to make appointments with them.
3. Start listing your assets and important information about yourself. I encourage you to use my free [Vital Statistics PDF](#) to help you get started. Some example categories you'll find are:
 - o Important documents
 - o Properties
 - o Investments
 - o Military service
4. Store your completed Vital Statistics document in a secure location known by your loved ones. This way, they can access it when necessary.

This process may not be easy, but it is crucial in helping to prevent your assets from becoming unclaimed and ensuring your estate is handled the way you intend. I hope these tips help make the process less daunting, and the Vital Statistics PDF helps you get started.

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