# ESTATE LEGACY & BENEFICIARY PLANNING

## ESTATE PLANNING DOCUMENTS

- Trust (Revocable Living Trust)
- Will / Pour-over will
- Living Will
- Durable Financial POA (Power of Attorney)
- Durable Healthcare POA (Power of Attorney)
- Mental Healthcare POA (Power of Attorney)

## HOW TO HOLD TITLE TO YOUR ASSETS

- Trust
- Individual
- Joint
- Tenants in Common
- Joint with Rights of Survivorship
- AZ Beneficiary Deed

## BENEFICIARY DESIGNATIONS

- Primary, Contingent, Tertiary
- Life Insurance
- IRAs
- 401Ks
- Roth IRAs
- Annuities
- Pension Plans
- Retirement Accounts
- TOD / PODs
  (Transfer on Death/Payable on Death)

## LEGACY PLANNING

- Tax-Advantaged Accounts
- Tax-Free Accounts
- Step-up in Basis Assets
- Charitable & Philanthropic Wishes
- Two Generation Tax-Free Legacy Plan

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