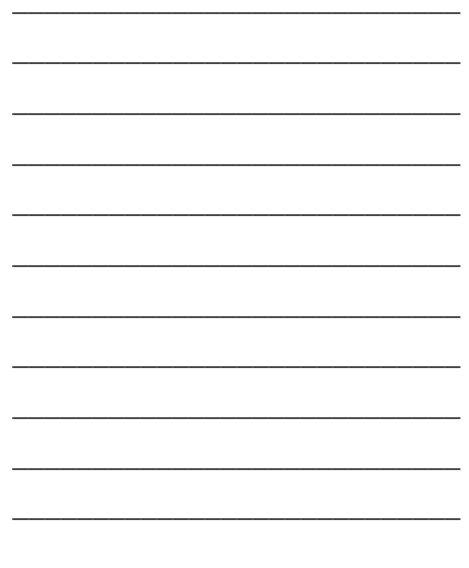


- Team approach to estate planning
- Why you need an estate plan
- Hallmarks and key elements of an estate plan



The team approach to estate planning

Key members of your team

1. **Your Edward Jones branch team**
 - Financial Advisor
 - Branch Office Administrator
2. **Your Edward Jones home office team**
 - Research Strategists and Analysts
 - Client Consultation Group
 - And more
3. **Your legal and tax professionals**
 - Accountant
 - Lawyer



Edward Jones, its employees and financial advisors are not estate planners and cannot provide tax or legal advice. Clients/prospective clients should consult their estate-planning lawyer or qualified tax advisor regarding their situation.

Key steps to financial success

Working together, we'll use the Edward Jones process to establish, confirm, and regularly revisit your financial strategy.





Did you know?

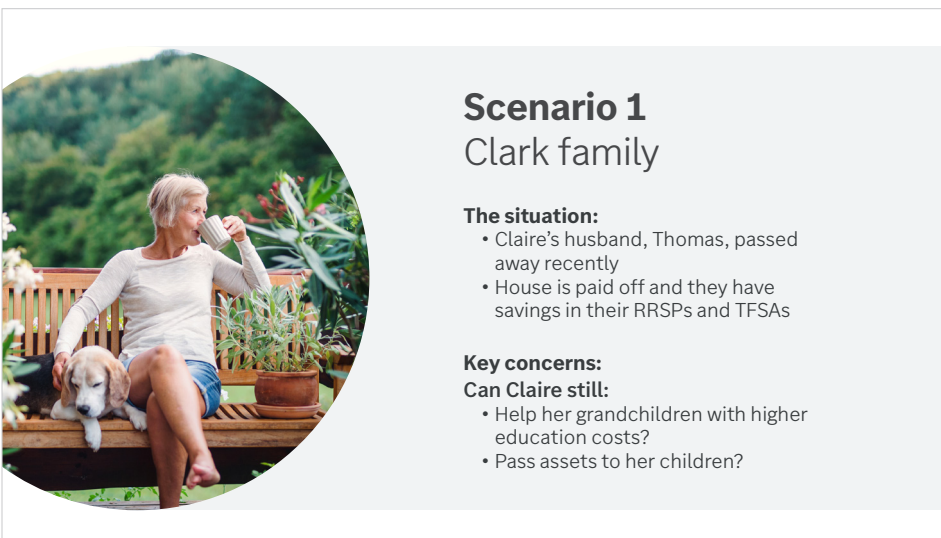
When it comes to your estate, even if you've taken no action at all, everyone in this room has an estate plan.

Does the plan you have reflect your wishes?



Scenario 1

"We don't have an 'estate.'
We don't need an estate plan."

[illegible][illegible]

[illegible]

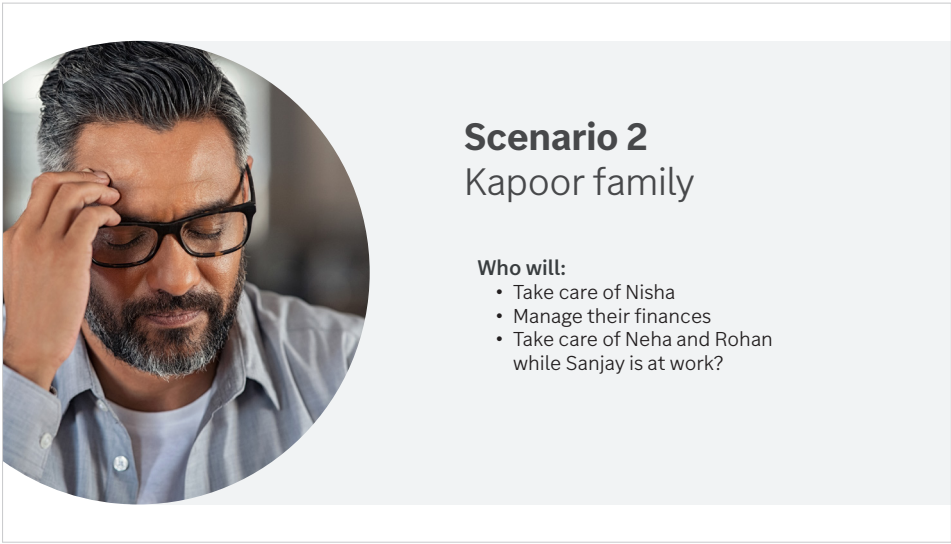
Scenario 2

Meet the Kapoor family

The parents: Sanjay and Nisha
The children: Neha (8) and Rohan (10)

The situation:
Married 13 years, two children
Nisha has suffered a recent medical crisis

[illegible]



Scenario 2

Kapoor family

Who will:

- Take care of Nisha
- Manage their finances
- Take care of Neha and Rohan while Sanjay is at work?

[illegible]

Scenario 3

“We have a plan.
So, we’re set for life.”

[illegible]



Scenario 3

Meet the West family

The parents: Carl and Victoria
The children: Ally and Jen
 Married three years (Patrick's second marriage)

The “wake-up call”

[illegible]

Scenario 3

West family

The situation:

- Are my affairs in order?
- Who are the beneficiaries?
- Who is the executor/trustee?

[illegible]







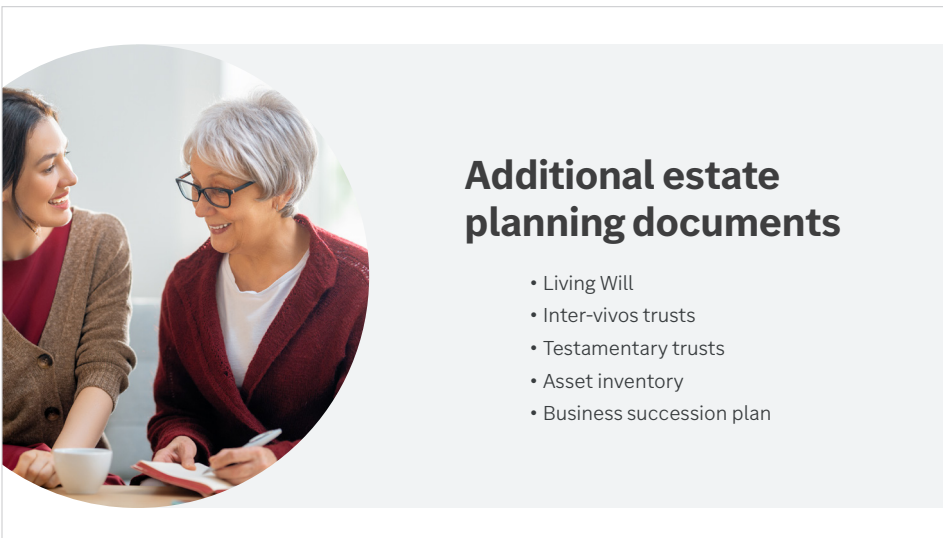
Power of Attorney for Property



Power of Attorney for Personal Care



Beneficiary designation forms



Additional estate planning documents

- Living Will
- Inter-vivos trusts
- Testamentary trusts
- Asset inventory
- Business succession plan



**Considerations
for small business
owners/sizeable estates**



The importance of review

Discuss:

- Your current estate plan and associated legal documents
- Your beneficiary designations on registered accounts or insurance policies
- Any major life changes

What makes us unique: Doing money differently®



- 1 We prioritize what's most important to you and help you define your short- and long-term goals before providing advice.
- 2 We build deep trusted relationships and work with you to develop strategies that support your goals related to health, family, purpose, and finance.
- 3 We provide comprehensive planning and advice to help balance and achieve your goals.
- 4 We partner with you through life's curveballs, cannonballs and windfalls and we'll work together to adjust your plans as needed.

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Your priorities are our priorities



Financial management



Asset management



Risk management



Tax planning



Retirement planning



Estate planning



Business planning

Edward Jones

Q&A



Edward Jones

Let's connect!



Email me directly if you have additional questions



Call my office



Complete the My Priorities Quiz and bring it to your next appointment



How did I do? Complete the seminar evaluation

57

[illegible]

36

[illegible]