



Taking Control of Your Future: The Importance of Estate Planning

It is critical for every adult individual to have fundamental estate planning documents to manage and protect against risk in the event of incapacity and death, including:

- Financial Power of Attorney
- Advance Directives for Health Care
- Last Will and Testament

Financial Powers of Attorney and Advanced Directives are valid during your lifetime and serve a similar purpose as an insurance policy. The documents may never need to be used. However, the goal is to have the peace of mind that you chose the person(s) managing your financial and health care decisions and that you set the parameters as to the actions that person(s) may take on your behalf should you become incapacitated.

In Pennsylvania, if you die without a Last Will and Testament, the law dictates the individuals entitled to your estate and the individuals that may administer your estate. Executing a Last Will and Testament to direct your estate at your death eliminates the chance of your legacy being controlled and passing to different person(s) or charities than you intended.

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Plan for your future and protect your family with effective estate planning. Let our trusted ensemble of financial advisors help you make the best decision for your financial future.

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