

# PREPARING YOUR ESTATE PLAN

*Preparing Your Estate Plan* is a seminar designed to help people better understand the basics of Estate Planning so they can choose the options that make the most sense for their specific situations.

## Outline

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Welcome/Introduction

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Seminar Overview

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Account Registration

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Beneficiary Designation

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Will

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Trust

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Important Tax Information

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Life Insurance

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Transfer on Death

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Q&A/Thank You

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