

## Estate Planning Basics

Our educational tools, including a seminar and a sales idea, can help you connect with your clients and take weight off their shoulders. Topics covered include:

- Planning for incapacity and health care directives
- Property management
- Wills and probate taxes
- Tax basics
- Lifetime gifting
- Trusts

Plus, the article, *Six Key Considerations of Estate Planning*, can be shared with your clients. It's easy...just click "Email Your Clients" below and it will launch an email that includes a link to the article.

[Read the Client Guide](#)

### **Related Value-Add Marketing Resources**



#### **Seminar - Estate Planning Basics**

A seminar advisors can present to clients providing what to consider about estate planning.

[Download the Presentation >](#)



#### **Estate Planning Basics Sales Idea**

A handout for your clients on what they need to know about estate planning. Includes information on wills, probate, taxes and more.

[Download the Sales Idea >](#)

### **Shareable Content**



Share "*Six Key Considerations of Estate Planning*" with your clients.

[Email Your Clients](#)

## Related Resources

- [Life Stage Investing for Your Clients](#)
- [Introducing Annuities to Your Clients](#)
- [More Value Add Resources](#)

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