

LEGACY LEGEND™.

Helping You Take Care Of Those You Love



Introducing Retirement Advocates, Inc.
new comprehensive service package to
help you with your legacy planning needs.

You are getting settled into retirement. You have an income plan and you are confident your assets are working for you in the most efficient manner possible. Now you are ready to begin your legacy planning to ensure the people and causes you hold dear receive an effective and efficient transition of your remaining assets when you are gone.

You have always wanted to begin this planning process but where do you start? Do you see an attorney? Do you visit the local funeral home and start planning your funeral? Do you need a trust? A will? What about beneficiaries? What if you need long-term care? What will happen to your assets then?



What is the best approach to take to make sure all of these end of life issues are handled appropriately? It can be so overwhelming!

We help you with all of these matters by taking it one step at a time and starting out with a personalized approach - a discussion of what is important to you. We use a comprehensive checklist to make certain nothing is forgotten or left half-done. We help guide you in these areas so that you can make wise decisions about taking care of what matters the most.

The Legacy Legend service package includes:

- Up to two 45 - 60 minute complimentary consultations.
- A discussion of what is important to you to leave behind and to whom or what.
- Beneficiary Review: A thorough look at how your beneficiaries are set up with all your accounts. Do they need to be updated? No charge assistance with this even if it is not an account we manage.
- A personal walk-through Everplans® so that you can take care of all your life details, archive important documents and “talk” to your loved ones after you are gone.
- Are your assets set up for efficient estate transfer? Is paying for long-term care a concern? We look at all of this as well.
- Includes a one-hour free consultation with an estate planning attorney to help with powers-of-attorney, wills and trusts or other legal matters for estate transfer. (Optional)
- Checklists and a binder to help you stay organized through this entire process.



Our goal is to help you make this process as stress-free as possible - and maybe even have a little fun! Schedule your meeting today! Ask for a Legacy Legend appointment!

Call 262-764-4816 - or schedule online at: <https://go.oncehub.com/LegacyLegend>