

Estate Planning Services

Offered by Forefront Advisor Network



Existing Estate Plan Review

INDIVIDUAL

COUPLE

\$300

\$300

Provide us a copy of your existing estate plan and receive a summary of all your previous decisions making up your current trust or will documents. We will review the summary with you and determine whether or not your current plan represents your current desires.

Will Based

INDIVIDUAL

COUPLE

\$1000

\$1,350

- Will(s)
- Financial Power of Attorney
- Medical Power of Attorney or Advance Health Care Directive
- HIPAA release

Trust Based

INDIVIDUAL

COUPLE

\$2,000

\$3,300

- Certification of trust
- General transfer
- Property agreement for community property states
- Financial Power of Attorney
- Medical Power of Attorney or Advance Health Care Directive
- HIPAA release
- Pour Over Will
- Deed(s) filed for real property (additional charge between \$300 to \$800)
- Business Interest Transfers for LLCs/entities (Additional charge of \$300)

Estate Plan Update

INDIVIDUAL

COUPLE

\$300

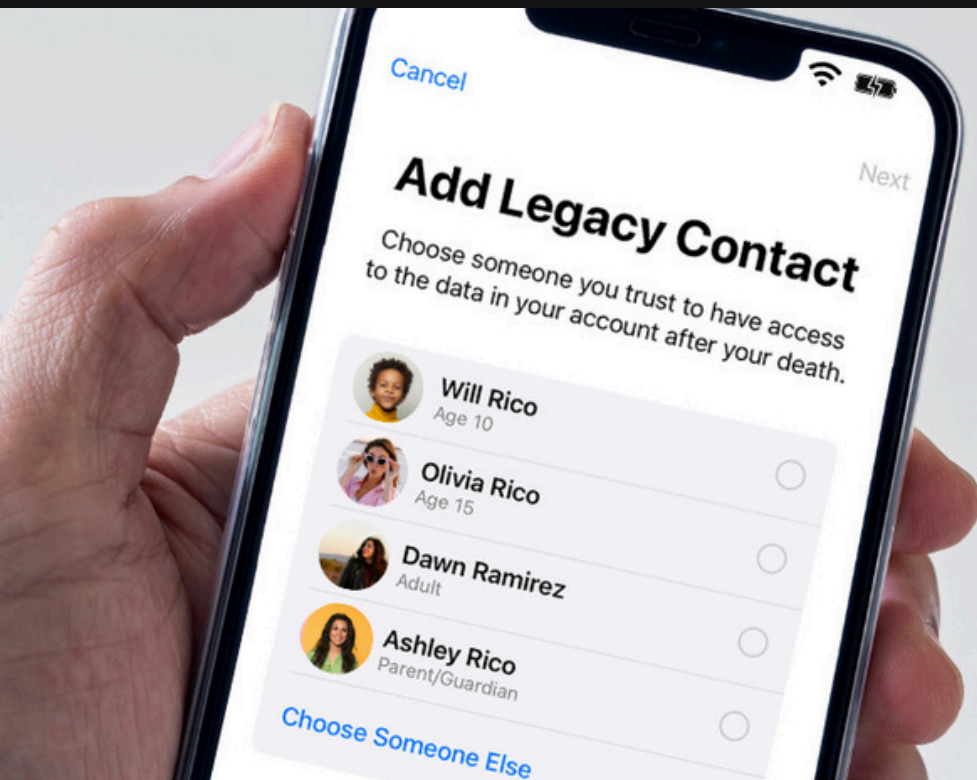
\$300

Annually review plans created by our estate planning team at Encore and easily update your estate plan in future years. Keep your estate plans current with your desires

Estate Planning Services Powered by Encore

How to Add a Legacy Contact

for Your Apple ID



A Legacy Contact is someone you choose to access your Apple account data after you pass away. This data might include photos, messages, and more. Follow these steps in order to add a Legacy Contact.

Who Can Be a Legacy Contact?

- Anyone you choose, regardless of Apple device ownership.
- Multiple Legacy Contacts can be added.

What Happens After You Pass Away ?

- Your designated Legacy Contact requests access using an access key and your death certificate.
- Apple verifies the request and provides a special Apple ID for accessing your account.
- Your original Apple ID and password no longer work.
- Access is granted for three years, after which the account is deleted.

What You Need:



An Apple device running iOS 15.2 or later, or macOS Monterey 12.1 or later



Two-factor authentication enabled



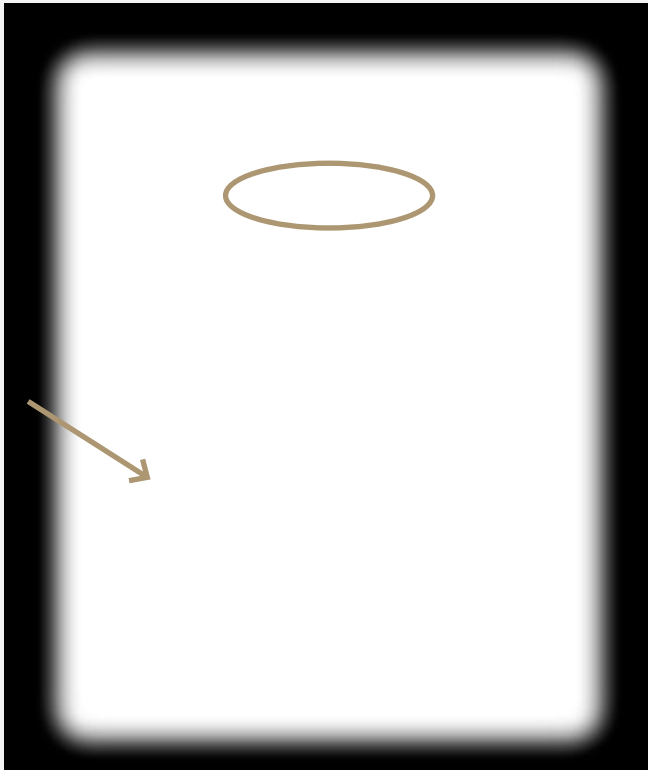
To be over 13 years old

How to Add a Legacy Contact

for Your Apple ID (continued)

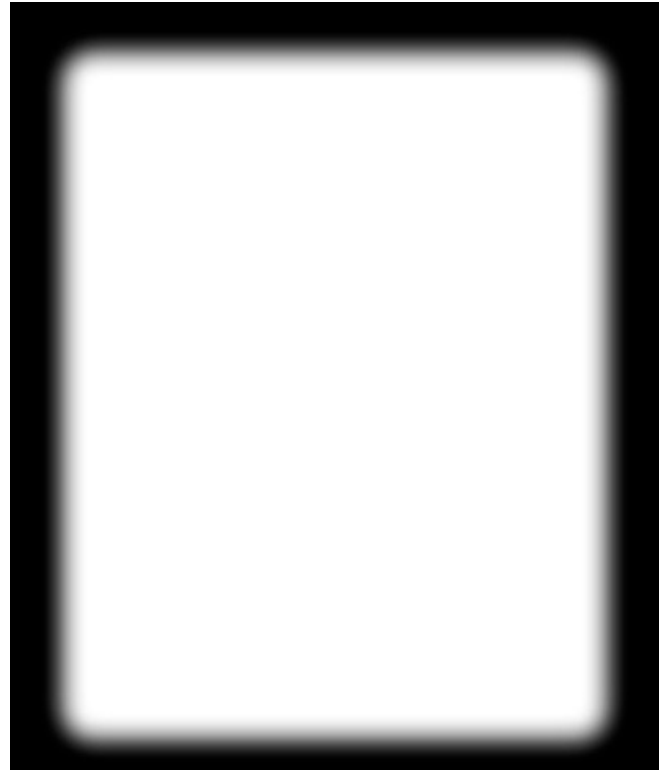
How to Add a Legacy Contact:

1. Go to Settings (iPhone/iPad) or System Settings (Mac).
2. Tap or click your name, then "Sign-In & Security."
3. Tap or click "Legacy Contact."
4. Tap or click "Add Legacy Contact."
5. Follow the on-screen instructions.



Sharing the Access Key:

- The access key is crucial for your Legacy Contact to gain access.
- You can share it via Messages, print it, or save it with your estate planning documents.



Removing a Legacy Contact:

- You can remove a Legacy Contact at any time in your Apple ID settings.

Important Notes:

- Certain data, like purchases and Keychain information, cannot be accessed by your Legacy Contact.
- Any Legacy Contact can make decisions about your account data, including deletion.
- Documentation requirements for accessing the account may vary by region.



FOREFRONT

Will Terminology & Frequently Asked Questions

What does an Executor Do:

The executor is also responsible for keeping the assets safe until they can be properly distributed to those named in the will or to creditors. The executor is generally in charge of making sure the property that is named in the will goes to the right people.

What does a Guardian Do:

What is a Guardian? A legal guardian is someone who is assigned to be the caregiver to a minor child or children in the event the parents are no longer able to maintain responsibility for them. You may choose to have more than one guardian, such as a grandparent, aunt, uncle, sibling, family friend, etc.

What does a Trustee Do:

A trust is an agreement in which one person (the "settlor") agrees to transfer property to another (the "trustee") who manages that property for the benefit

of someone else (the "beneficiary"). When you are the trustee, your job is to manage trust assets and distribute them as the trust document directs.

What does a Financial Power of Attorney Do:

The durable financial power of attorney is simply a way to allow someone else to manage your finances in the event that you become incapacitated and are unable to make those decisions yourself. More precisely, it grants someone legal authority to act on your behalf for financial issues.

What does a Medical Power of Attorney Do:

A durable medical power of attorney gives the health care agent broad power and responsibility to make decisions regarding the principal's medical treatment, including medication, tests, nourishment and hydration, as well as decisions regarding surgery, doctors, hospitals and rehabilitation facilities.

YOUR INFORMATION

This information is current as of (date): _____

Your Name (as it appears on driver's license): _____

Date of Birth: _____ Place of birth: _____

U.S. Citizen? Yes No

Home address: _____

Primary telephone: _____ E-Mail: _____

Employer: _____

Position: _____

Military Service? If so, list branch of service, highest rank attained and dates of service: _____

SPOUSE INFORMATION

This information is current as of (date): _____

Your Name (as it appears on driver's license): _____

Date of Birth: _____ Place of birth: _____

U.S. Citizen? Yes No

Home address: _____

Primary telephone: _____ E-Mail: _____

Employer: _____

Position: _____

Military Service? If so, list branch of service, highest rank attained and dates of service: _____

CHILDREN INFORMATION

For each child, please give the information requested below. Use the reverse side of this page, if necessary. If any child is not the child of your present marriage, please indicate.

Child 1: Name (first, middle, last): _____

Date of Birth: _____ Place of birth: _____

Home address, if different than yours: _____

If married, name of spouse (first, middle, last): _____

Child 2: Name (first, middle, last): _____

Date of Birth: _____ Place of birth: _____

Home address, if different than yours: _____

If married, name of spouse (first, middle, last): _____

Child 3: Name (first, middle, last): _____

Date of Birth: _____ Place of birth: _____

Home address, if different than yours: _____

If married, name of spouse (first, middle, last): _____

ASSETS

Note: You are encouraged to complete the Asset Information Form.

Do you have a safe deposit box? If so, state the location, generally describe the contents, and state the name of anyone else who has access to it:

Check all of the following assets that you currently own:

Checking account	Savings account	Bonds	Stocks
Business interests	Real estate – Residence	Real estate – Other	Motor vehicles
Livestock	Retirement accounts	Life insurance policies	

Is the value of your estate equal to or greater than \$11.2 million (or \$22.4 million for a married couple)?

Yes No

WILL PROVISIONS

Executor:

Primary: _____
Address: _____
Phone: _____
Alternate: _____
Address: _____
Phone: _____

Guardian of the children:

Primary: _____
Address: _____
Phone: _____
Alternate: _____
Address: _____
Phone: _____

Trustee:

Primary: _____
Address: _____
Phone: _____
Alternate: _____
Address: _____
Phone: _____

Are all of the persons named in this form, including you and your spouse, United States citizens? If not, indicate which are not United States citizens: _____

DISPOSITION OF PROPERTY

Describe generally where you want to leave your property after your death.

If your spouse survives you:

If your spouse does not survive you:

If neither your spouse nor your children survive you:

Do you want to provide instructions for the disposition of your body after death (funeral/burial)? If so, please describe:

Use this space to note any questions, give any additional information, or make any other comments regarding your will:

Are all of the persons named in this form, including you and your spouse, United States citizens? If not, indicate which are not United States citizens: _____

Financial Power of Attorney:

Primary Agent: _____

Address: _____

Phone: _____

Alternate Agent: _____

Address: _____

Phone: _____

Medical Power of Attorney:

Primary Agent: _____

Address: _____

Phone: _____

Alternate Agent: _____

Address: _____

Phone: _____

HIPAA Authorization:

(authorizes doctors and insurance companies to share your private healthcare information)

Primary Agent: _____

Address: _____

Phone: _____

Alternate Agent: _____

Address: _____

Phone: _____

LIVING WILL**Client**

If you are suffering from a terminal condition, do you request only those treatments needed to keep you comfortable, or do you request all available life-sustaining treatments?

Comfort Treatment Only

All Life-Sustaining Treatments



ASSETS

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Stocks

Business interests

Real estate – Residence

Real estate – Other

Motor vehicles

Livestock

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Primary: _____

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Phone: _____

Alternate: _____

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Primary: _____

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Address: _____

Phone: _____

Trustee:

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Financial Power of Attorney:

Primary Agent: _____

Address: _____

Phone: _____

Alternate Agent: _____

Address: _____

Phone: _____

Medical Power of Attorney:

Primary Agent: _____

Address: _____

Phone: _____

Alternate Agent: _____

Address: _____

Phone: _____

**HIPAA Authorization:**

(authorizes doctors and insurance companies to share your private healthcare information)

Primary Agent: _____

Address: _____

Phone: _____

Alternate Agent: _____

Address: _____

Phone: _____

LIVING WILL**Co-Client**

If you are suffering from a terminal condition, do you request only those treatments needed to keep you comfortable, or do you request all available life-sustaining treatments?

Comfort Treatment Only

All Life-Sustaining Treatments