THE COMPLETE

Estate Planning Checklist from Wealth.com

Inventory Your Estate

Take Stock of your Assets

Before starting your estate plan, you want to take inventory of everything you own. Maintaining this inventory ensures nothing is forgotten when it's time to distribute your estate. Use the "Add Asset" feature on the Wealth Dashboard to link financial accounts and add real estate and other assets.

Name Your People

Taking note of the important people in your life is critical, as they will likely be some of the people you select to be beneficiaries and/or decision-makers in your estate plan. Use the "Contact Card" feature in the Wealth Vault to maintain a Rolodex of key people in your life.

Provision Access to Select Individuals

Creating a single source of truth helps reduce confusion, avoid conflict and ensure alignment around your goals and intentions. Use Wealth to provide controlled access to family and trusted intermediaries so they can view your estate plan, assets and other essential documents.

Learn more at **wealth.com**

wealth.com | PATH FINANCIAL PARTNERS

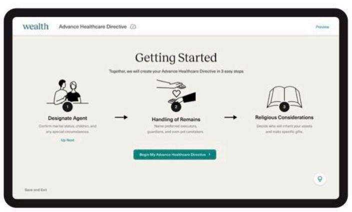
Determine the Best Estate Plan for You

Create Your Estate Plan

Your estate plan is composed of a series of legal documents that state your healthcare wishes, what you want to happen to your assets and who you want to make financial decisions if you are unable to. Use The Quiz to determine which estate plan is right for you, then complete the documents using the Wealth wizards

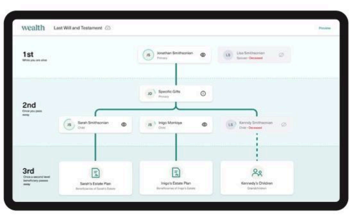
Complete your Financial Power of Attorney

This document lets your chosen agent make financial decisions on your behalf. You can choose to make it effective immediately in case of emergencies.



Complete your Advance Health Care Directive

This document lets your chosen agent make health care decisions on your behalf if you are incapacitated.



Make a Will and/or Trust

This is the document that specifies your wishes for how your estate will be distributed and to whom. You can also name key decision makers, such as your executor, guardian and caretakers for pets.

Use the Post-Signing Checklist

You may choose to have Wealth print and ship your documents or print them yourself. Once in hand, follow instructions to sign.

Secure Your Estate

Vault Your Estate Plan

Once you have created and validated your estate plan, you need somewhere to safely store it. The Wealth Vault is a secure location to keep copies of your estate plan and can be accessed anytime by you or your provisioned contacts.

Vault Your Other Important Documents

Having one source of truth for all of your important documents ensures they are organized and accessible to your loved ones and key decision-makers should something to happen you. You can securely store essential documents, such as driver's licenses, passports, tax forms, healthcare records, and more, in the Wealth Vault. Once uploaded, you can access these documents anytime through the Wealth platform.

Grant Emergency Access

Should something happen, your key people need to be able to make decisions on your behalf and quickly access your estate plan and essential documents. Wealth lets you choose your Emergency Access Contacts and will grant them access to your account should they need it. Designate a minimum of two Emergency Access Contacts by going to your Contacts and selecting them as your Emergency Access Contacts.

Evolve Your Estate

Live Your Life

Your assets have been added, and your documents have been created, signed and Vaulted. You can view them any time through the Wealth app. When the time comes, your loved ones can access your entire asset inventory and estate plan.

Use Wealth to Track Your Growing Estate

Your estate plan needs to grow and change with your finances. Keep track of your assets through the Wealth Dashboard, and add new ones as your estate grows

Wealth is Your Partner

Wealth will send you reminders and keep you updated on changes that might affect your plan so you can rest easy knowing your estate plan will always be accurate and effective.

Evolve Your Plan

Life is not static; your estate plan shouldn't be either. As your estate changes and your people grow, so should your plan. When life changes, Wealth is here for you to update your plan as needed.

Wealth.com is not a law firm and is not practicing law.
Every user's situation is unique. When making decisions about what estate planning feature is right for a user, note that a technology platform such as wealth.com uses generalized explanations and examples to educate you. To have these legal principles applied to a user's circumstances, consult with a licensed attorney.

Learn more at **wealth.com**

wealth.com

PATH FINANCIAL PARTNERS