
(UBS)

Estate planning: Inheritance strategies and beyond

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You created your family wealth, but how can you ensure it passes to the people and causes you love? Planning for any eventuality can provide you and your family with comfort now and a smoother transition when the time comes later.

There are many different types of estate planning documents to capture final wishes. Our **Create your legacy: inheritance strategies and beyond** website provides a list and explanation of the foundational documents for estate planning including: Revocable Living Trust (RLT), Financial Durable Power of Attorney (DPOA), Medical directive, Health Insurance Portability, Last will and testament and Life insurance plans.

Once you have met with an attorney and established an estate plan, it is also important to communicate your plan with your trustee, and if appropriate, your beneficiaries. Estate documents are not substitutes for conversations about values.

Your family may not need to know all the details, but a discussion can be helpful. You should also place your documents somewhere that is not only safe, but easily accessible. Share this location with your trustee and other key parties.

Although creating an estate plan may seem overwhelming, it's essential to help ensure you and your family are well prepared.

To learn about estate planning with guidance for a power of attorney (POA), a Revocable Living Trust and more, please visit the **UBS.com page on Estate Planning**.

Don't forget to start or update your financial plan using Wealth Way - **Click here** to learn more.

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