

## Wills and Trusts - Suggested Items

### Meeting Objectives

- Discover the difference between a Last Will and Revocable Trust
- Identify the features and purpose for each document as they relate to your specific estate planning goals
- Understand how a Financial Power of Attorney can be valuable to your family in the event of your incapacity
- Learn the importance of establishing a Medical Directive and Living Will

### Things to bring with you if, available

- A copy of any existing estate planning documents such as an old Will or existing Trust
- A list of your current assets such as property addresses, bank/investment accounts, and life insurance (statements/account numbers are not needed)

**Note:** Document preparation services are offered through Desert Financial Federal Credit Union; an Arizona Supreme Court Certified Legal Document Preparation Business Entity (CLDP #81024). Legal document preparation services are not insured by the NCUA and have no credit union guarantee.