



ESTATE PLANNING 101: MILITARY EDITION CHECKLIST

The best way to protect your military family later, is to prepare now with an estate plan. Use this list of essentials to help you get started.

ARE YOU PREPARED?

- WILL
- TRUST
- LIFE INSURANCE
- BENEFICIARY FORMS

- MEDICAL POWERS OF ATTORNEY
- DURABLE POWERS OF ATTORNEY
- HEALTH CARE DIRECTIVES
- LIVING WILL

- TITLING/OWNERSHIP
- GIFTS TO FAMILY
- ESTATE TAX
- FUNERAL PLAN AND EXPENSES

- SURVIVOR BENEFIT PLAN
- DD214
- VETERANS AWARD LETTER
- VETERANS AFFAIRS EDUCATIONAL BENEFITS LETTER

CHART YOUR COURSE WITH **MILITARY FINANCIAL SERVICES**

AAFMAA WEALTH MANAGEMENT & TRUST RELATIONSHIP MANAGERS ARE HERE TO **HELP BUILD YOUR WEALTH AND PRESERVE YOUR LEGACY.**

Estate planning is only one piece of a **comprehensive military financial plan.**



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FINANCIAL PLANNING • INVESTMENT MANAGEMENT • TRUST SERVICES

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