









FAMILY ESTATE PLANNING

Essential Links and Resources

VIDEOS



-  What is Wealth.com (Platform Intro)
-  What is Estate Planning
-  Will vs Trust
-  How to Register for wealth.com
-  How to Create a New Document
-  Review, Complete & Sign your Document
-  Updating a Signed Document
-  Switching to a New Document

RESOURCE LINKS



[Pre-Meeting Worksheets for Couples](#)

[Pre-Meeting Worksheets for Individuals](#)

[How to Manage Real Estate in an Estate Plan](#)

[Individual vs Joint Trusts](#)


[Estate Planning Terms Glossary](#)



[When to Update an Estate Plan](#)

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