Location

Insurance Agent(s)

(life insurance, home/renters health, liability, etc.

Accountant

(taxes, investments, cash mgt, etc.)

Financial Advisor

(IRA, 401K, 529, investments)

Education

Parents

Child

Child

My Planning Team
My Legacy

Me

Spouse

Societal/ Age

Physician/ Caregivers Philanthropic Advisor

(lifetime giving, legacy giving, nonprofit advisement) **Attorney**

(will, power of attorney, living will/medical proxy, business, liability, domestic, trusts etc.)

Spiritual