



# 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.**



AAFMAA Wealth Management & Trust LLC

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