

9 OUT OF 10 AMERICANS BELIEVE
HAVING A WILL IS IMPORTANT ¹



HOWEVER, ONLY 4 OUT OF 10 AMERICANS
HAVE AN UP-TO-DATE ESTATE PLAN ²



58%
Haven't made a will



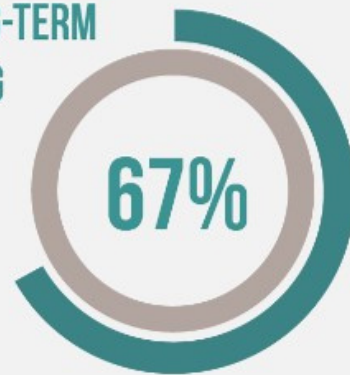
27%
Plan to make a will but
don't see the urgency

15%
Don't think they need a will ³

WITH AN ESTATE PLAN YOU CAN:

1. TAKE CARE OF YOUR FAMILY

67% OF AMERICANS ARE CONCERNED
ABOUT THEIR FAMILIES' LONG-TERM
FINANCIAL WELL-BEING



2. ALLOCATE FUNDS FOR A CHILD'S HEALTH, EDUCATION & SUPPORT

THE AVERAGE COST TO RAISE A CHILD TO THE AGE OF 18 IS:



3. AVOID PROBATE FEES & MINIMIZE TAXES FOR YOUR HEIRS

3-7%
AVERAGE PERCENTAGE OF YOUR ASSETS
SPENT ON PROBATE



THE STATE OF ESTATE PLANNING

How many adults in the U.S. have a will or living trust in place? ¹



MILLENNIALS

Young Adult & Young Families



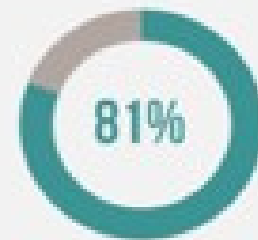
GEN XERS

Families with Growing Assets



ADULTS 72+

Post Retirement Long-Term Care



ELEMENTS OF AN ESTATE PLAN



LAST WILL &
TESTAMENT

Allows you to decide the
disposition of personal and
real property, as well as
name a guardian



DURABLE POWER
OF ATTORNEY

Allows you to appoint
someone with power to
handle financial matters



ADVANCE
DIRECTIVE

Allows you to appoint someone who
can make medical decisions for you
and decide whether or not you
want life-sustaining procedures



REVOCABLE OR
IRREVOCABLE TRUST

Allows you to avoid probate
and retain more control
over the disposition of your
assets over time

WE CAN HELP.

TO BOOK YOUR ESTATE PLANNING CONSULT, PLEASE CALL 503-227-1515
OR VISIT WWW.GEVURTZMENASHE.COM

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SINCE 1982

1. More Than Half of American Adults Don't Have a Will, 2017 Survey Shows, Caring.com.

2 "Haven't Done A Will Yet?", Barbranda Lumpkins Walls, AARP, February 2017.

3 "Estate Planning by the Numbers," Caring.com and Princeton Survey Research Associates International, October 2017.

4. "Survey: Half of America Sees Estate Planning as Tool of the Ultra-Rich," Lesley Kessler, WealthCounsel at PR Newswire, October 2016.

5. "Expenditures on Children by Families, 2015" U.S. Department of Agriculture, revised March 2017.

6. "Understanding Probate Lawyer Fees," Michelle Fabio, Esq., LegalZoom.com, November 2015.