

NATIONAL MAKE-A-WILL MONTH

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



HOWEVER, IF YOU DIE WITHOUT A WILL, THE STATE YOU LIVE IN WILL DECIDE:



Who gets many of your assets and how to distribute them



Who will become your children's legal guardian



Who will be responsible for locating & distributing your assets

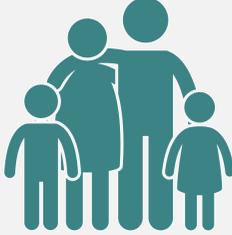
THE STATE OF ESTATE PLANNING

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

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 ⁴



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

The average cost to raise a child to the age of 18 is:



Without an estate plan, you risk passing that burden to your family with little financial help.

3. AVOID PROBATE FEES & MINIMIZE TAXES FOR YOUR HEIRS

Probate is the legal process that transfers ownership of your property. A trust allows assets to pass free of probate.

3-7%

AVERAGE PERCENTAGE OF YOUR ASSETS SPENT ON PROBATE ⁶



\$1M



IN OREGON, ASSETS OVER \$1M ARE SUBJECT TO ESTATE TAX

\$2.193M



IN WASHINGTON, ASSETS OVER \$2.193M ARE SUBJECT TO ESTATE TAX

As a thank you for your continued commitment in serving our community during the COVID-19 public health crisis, we're offering:

COMPLIMENTARY CONSULTS AND REDUCED-RATE ESTATE PLANNING SERVICES FOR MEMBERS OF OUR

PROFESSIONAL MEDICAL COMMUNITY



WE CAN HELP.

TO BOOK YOUR ESTATE PLANNING CONSULT, PLEASE CALL 503-227-1515

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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.