



DENVER WEALTH MANAGEMENT, INC. | STANDARD OF CARE ESTATE PLANNING

Estate planning can be long and confusing; however, it is an integral facet of any financial plan. For assistance, please do not hesitate to reach out to our team—call our office at (303) 261-8015.

PAPERWORK

- Draft or update your will.
- File beneficiary forms for investment and bank accounts.
- Draft an inventory of all of your assets and liabilities.
- Appoint fiduciaries as needed.
- Write a legacy letter.
- Assign a medical durable power of attorney (POA).
- Create a living will.

FINANCES

As emotionally demanding as this process may be, it is essential to address your long-term and generational wealth goals to set your family and beneficiaries up for an easier transition.

- Consider and analyze life insurance policy options.
- Assign a financial power of attorney (POA).
- Name an executor.
- Plan memorial services and draft a budget.

 | **Helping successful individuals address their financial future.**

Securities offered through LPL Financial, Member FINRA/SIPC. Investment advice offered through Denver Wealth Management, Inc., a registered investment advisor. Denver Wealth Management, Inc. is a separate entity from LPL Financial.

This information is not intended to be a substitute for individualized legal advice. We suggest that you discuss your specific situation with a qualified legal advisor.