DENVER
WEALTH MANAGEMENT

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.**