

Plan It Forward

Let's get your will done, together



Establishing a last will and testament is a vital component of a sound money plan, yet it is something that the average American worker often delays. According to a 2021 Gallup survey, just less than half of Americans (46%) currently have a will that describes how they would like their money and estate to be handled upon their death.

That is why the financial planning team at Francis LLC is pleased to announce a new education service to assist you with this important task. Here's what we'll do together:

- 1) Your financial planner will help you better understand the important issues surrounding estate planning in light of your unique circumstance.
- 2) Your planner will then help you navigate options for will preparation, including local attorneys, online will preparation services, or services that might be available as an employee benefit.

To facilitate the process, we have contracted with **Trust & Will**, a leading provider of online will preparation services. If you elect to use Trust & Will's services, they will provide a **10% discount** off their regular retail prices for our participants. Know that Francis receives no referral fees or compensation of any kind from this organization.

Trust & Will provides three services with the help of on-call estate planning attorneys.

Nomination of Guardian

\$39 per individual or \$69 for couples

Specifies who will look after minor children, without having to complete a will.

Will-Based Estate Plan

\$159 per individual or \$259 for couples

Specifies who will look after minor children and what should happen to assets upon death. Also includes the staples of an estate plan to specify health care wishes and final arrangements with customized and state-specific documents.

Trust-Based Estate Plan

\$599 per individual or \$699 for couples

Provides for the completion of a trust that avoids probate court and allows assets to pass seamlessly to beneficiaries. Includes customized and state-specific estate planning documents to nominate guardians and outline what should happen in a medical emergency.

How to get started:

Reach out to an advisor to book an appointment via the Francis app or by visiting FrancisWay.com. You can also call (866) 232-6457 to schedule an appointment. Your financial planner will guide you through every step to help you check this important to-do off your list.

Together, let's get this will thing done!



**trust
& will**



Source: <https://news.gallup.com/poll/351500/how-many-americans-have-will.aspx>.

Services offered through Francis LLC, a Registered Investment Adviser with the SEC. Francis does not provide legal or tax advice.