

6 Core Estate Planning Documents

Last Will & Testament



Outlines how you want your assets distributed and who will care for any minor children after your death.

Revocable Living Trust



Manage and distribute assets during your lifetime and after you die without going through probate.

Durable Power Of Attorney



Gives someone you trust the authority to manage your finances on your behalf.

Advance Healthcare Directive



Specifies your medical treatment preferences and designates someone to make decisions if you're unable to.

Beneficiary Designations



Specify who will receive certain assets such as life insurance or retirement accounts.

Letter Of Intent



Supplements a will or trust, expressing personal wishes, funeral arrangements, account details, and any final messages.

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Avantax Planning Partners, Inc. ("APP") is a separate registered investment adviser and currently operates independently of TRPG.

On or about September 30, 2026, APP is expected to enter into an agreement with TRPG pursuant to which APP would assign its advisor contracts to TRPG. This transaction has not yet occurred and remains subject to required approvals and, where applicable, client consent. Upon completion of the transaction, the combined advisory business is expected to operate under the Cetera Planning Partners name. Until such time, advisory services continue to be provided by the client's existing investment adviser.

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