Gentreo provides life and estate planning tools to protect you and your family.

We're here to help you safeguard the people, pets, and assets that matter most.
WHY ESTATE PLANNING MATTERS

1. Without an estate plan, 3-8% of your net worth may be lost to courts and lawyer fees.

2. Courts can make decisions for your family, such as guardianship and asset distribution.

3. Lack of a plan can lead to uncertainty and damage family relationships.
Everyone over 18 needs an estate plan, regardless of age, race, or net worth.

Plans should be updated as life circumstances change.

1 in 5 people visit the emergency room each year.

1 in 20 people experience the death of a loved one annually.

Estate planning prepares you for life's unexpected events.
An estate plan that no one knows about is ineffective.
Sharing your plan with loved ones is crucial.
HOW GENTREO WORKS

- Gentreo is a full-service life and estate plan provider.
- We help you create and maintain a plan that adapts as your life evolves.
GUIDING YOU THROUGH LIFE'S CHANGES

- Whether it's marriage, having a baby, or caring for a loved one, Gentreo is with you.

- Milestones help you keep your estate up to date
**LAW WILL & TESTAMENT**

**Purpose:** To specify how your assets will be distributed after your death.

**Why Create It:** Ensure your wishes are followed, designate guardians for minors, and avoid intestacy laws.
HEALTH CARE PROXY

**Purpose:** Appoint someone to make medical decisions on your behalf if you become unable to do so.

**Why Create It:** Ensure your healthcare preferences are respected and followed during incapacity.
POWER OF ATTORNEY FOR FINANCES

**Purpose:** Appoint someone to manage your financial affairs if you become incapacitated.

**Why Create It:** Ensure your financial matters are handled according to your wishes.
LIVING TRUST AND POUR-OVER WILL

**Purpose:** To manage and distribute your assets during your lifetime and after death.

**Why Create It:** Avoid probate, maintain privacy, and provide for efficient asset transfer.
**PET TRUST**

**Purpose:** To provide for the care and financial support of your pets after your death.

**Why Create It:** Ensure your pets are well-cared for and financially supported in your absence.
Purpose: Appoint someone to make decisions regarding the care and well-being of your pets.

Why Create It: Ensure immediate care for your pets if you are unable to do so temporarily.
About Gentreo
We make protecting families easy, fast and affordable

- Now EVERYONE can do estate planning
- Legally binding in all 50 states
- Easy to create documents
- Yearly vs. one-and-done
- Update documents any time
- Secure and accessible storage
- The go-to resource to protect family when life happens
Everything is included

Create all state-specific documents:

- Last Will and Testament
- Living Trust
- Power of Attorney (Durable and Limited)
- Health Care Proxy
- Pet Trust
- Pet Power of Attorney
- Pet Information Card
- Emergency Card

- Personalized game plans
- 1:1 live coaching
- Secure storage and instant access
- Annual estate plan reviews
- Create memorial videos, and more
For HEUCU Members

- Information is available on the HEUCU website, and questions can be submitted to HEUCU
- Gentreo has live 1:1 customer support
  - Email questions
  - FAQs throughout completing your documents
  - Resource center
  - 15 min live customer support included
THANK YOU