

ESTATE PLANNING BASICS WITH GENTREO





- 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.

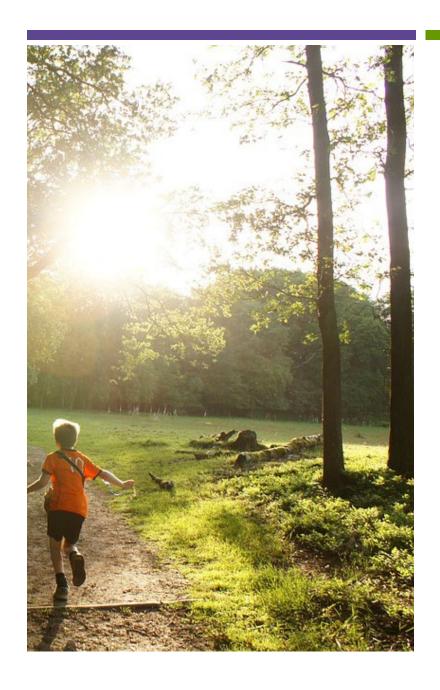
# ESTATE PLANNING FOR EVERYONE

- 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.





# PET POWER OF ATTORNEY

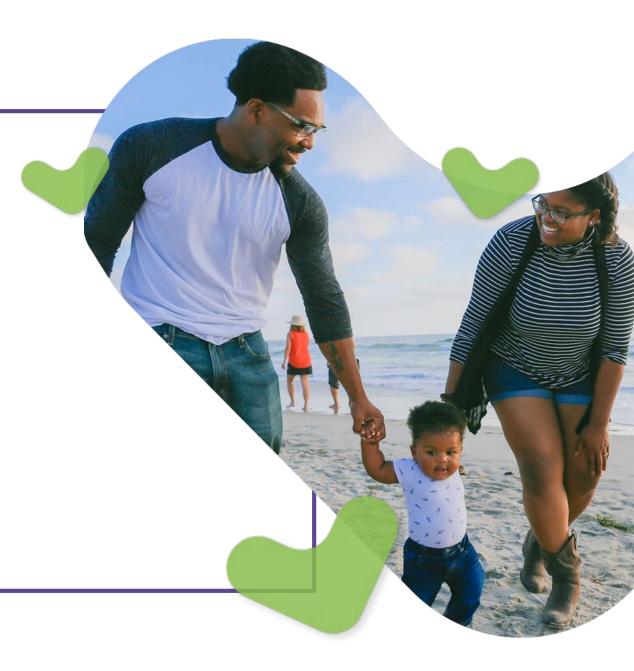
**Purpose:** Appoint someone to make decisions regarding the care and well-being of your pets.

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

