

THE ROADMAP FOR LIFE'S JOURNEYS

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

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- 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.

MAKE SURE EVERYONE KNOWS WHERE TO TURN

- 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



THE DOCUMENTS



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