Because your legacy shouldn't be left to chance

FINANCIAL ESSENTIALS with TIAA

Estate planning isn't just about preparing for the future—it's about creating peace of mind today. By organizing your wishes and protecting what you've built, you can help ensure your loved ones are cared for and your legacy continues with clarity and confidence.

Why estate planning matters

A thoughtful estate plan can help you:

Simplify the process
Without a trust or clear instructions, your loved ones may face a lengthy and costly legal process to settle your estate.

Control your legacy
A will or trust allows you to decide exactly how your assets are distributed.

Clarify your wishes
Your plan can include a living will, power of attorney, or healthcare proxy—guiding decisions if you're unable to make them yourself.

Simple ways to start

1. **Write down your wishes**
   Begin by outlining what matters most to you—both financially and personally. Then, work with an attorney to formalize these wishes in a will or trust.
2. **Review or designate your beneficiaries**
   Check all accounts and insurance policies to ensure your designations are current and reflect your intentions.
3. **Consider a trust**
   If you have multiple assets or a complex financial situation—or want to avoid probate—a trust can provide added clarity and protection.

Plan today

READ
Top estate planning pitfalls and how to avoid them

WATCH
Estate planning essentials: Understanding wills and trusts

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