

# Estate Planning: Identify Your Goals

An Estate Plan is absolutely essential for organizing your financial affairs and providing for the well being of your family members and favourite charitable organization.

Simply put, an Estate Plan is written documentation of how you want your assets to be owned, managed and preserved during your lifetime and how you want them dispersed after your death.

## Identify Your Goals:

- ▶ Are you most concerned about supporting your family?
- ▶ Leaving money for your grandchildren's education?
- ▶ Minimizing taxes?
- ▶ Providing for a charity?

The answers to these questions will determine how you set up your will and arrange your financial affairs. Contact **Stewart Financial Services** to assist you with your Estate Planning goals.