



Tips to Avoid your Assets having to go through the Probate Process:

1. Contact your banking institution and make sure any and all accounts you have contain a pay on death beneficiary.
2. Make sure any retirement accounts you have designate a pay on death beneficiary.
3. If you have any investments, bonds, funds, etc., contact your financial advisor and confirm all have pay on death beneficiaries or transfer on death designations.
4. If you have any other financial assets or accounts, make sure those have pay on death beneficiaries or transfer on death designations.
5. Put together a list outlining what important personal property assets you have, and who you want those assets to go to. That list can then be attached to your will.

****This pamphlet contains general information and not legal advice****

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