

GET YOUR FINANCIAL HOUSE IN ORDER



3 WAYS TO LEAVE A LEGACY, NOT A MESS:

1. Create a list of assets (see Option 1)
2. Organize records and share information with family (see Option 2)
3. Update beneficiary designations and plan for incapacity (see Option 3)

Option 1

Do It Myself



My Financial Blueprint

- Fillable net worth PDF
- 20-minute call

Complimentary

Option 2

Do It *With Me*



My Financial Records

Option 1 Plus:

- 2 meetings
- 3-in-1 checklist book
- Everplans site access

Price Varies

Option 3

Do it *For Me*



My Financial House in Order*

Option 2 Plus:

- Update asset titles
- Update beneficiaries
- Add POAs on accounts

Price Varies



**Marie can help you get on track to experience
*less worry, more life!***

Contact Marie Burns today!
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