



Are You Prepared?

Nancy A. Roberson, J.D. became interested in the field of estate planning and probate law as a result of her personal tragedy. Nancy became widowed at the age of 27 while caring for a two year old daughter. Being widowed at such a young age and having to work through the difficulty of the situation chartered Nancy on a quest to help encourage and teach others to be more prepared.

Outline of the presentation:

- Assembling your team
 - Proper preparation involves many people (your family, your clergy, your lawyer and possibly many others).
- Developing a comprehensive estate plan
 - This may include items such as a will, health care directives, business agreements, etc.
- Assembling your paperwork
 - Organize your medical, business and other important paperwork.
- Formulating a financial plan
 - Establish a budget, retirement plan, credit, etc.
- Discussing planning issues with loved ones
 - Often many people are affected by your decisions; they need to understand your thoughts and plans.
- Maintaining the plan
 - Ideas for maintaining the plan.



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