

Slide 1 — Welcome & Introduction

Speaking Points:

- Thank everyone for attending.
- Explain the purpose of the session.
- Emphasize: I am not an attorney; this is educational only.

Slide 2 — What Is Estate Planning?

Speaking Points:

- Define estate planning in simple terms.
- Explain why it matters for everyone.

Slide 3 — Why Estate Planning Matters

Speaking Points:

- Reduces stress for family.
- Ensures wishes are honored.

Slide 4 — Common Misconceptions

Speaking Points:

- Estate planning is not only for wealthy people.
- Families cannot "just figure it out" without documents.

Slide 5 — Key Documents

Speaking Points:

- Will, POA, Medical POA, Advance Directive.
- Briefly explain each document.

Slide 6 — Understanding Wills

Speaking Points:

- What a will does.
- What happens without one (intestacy).

Slide 7 — Powers of Attorney

Speaking Points:

- Financial POA responsibilities.
- Medical POA responsibilities.
- Importance of choosing trustworthy agents.

Slide 8 — Advance Healthcare Directives

Speaking Points:

- Communicating medical wishes.
- Reducing family conflict.

Slide 9 — Beneficiary Designations

Speaking Points:

- Life insurance, retirement accounts, POD/TOD.
- Explain how these bypass probate.

Slide 10 — Organizing Documents

Speaking Points:

- What to gather.

- Where to store documents.

Slide 11 — What Is Probate?

Speaking Points:

- Simple explanation of probate.
- Why some people try to avoid it.

Slide 12 — Trusts Overview

Speaking Points:

- What a trust is.
- Why some people use them.

Slide 13 — Free Online Tools

Speaking Points:

- FreeWill, DoYourOwnWill, state forms, AARP resources.
- Good for simple needs.

Slide 14 — Low-Cost Online Tools

Speaking Points:

- LegalZoom (\$100–\$200), Trust & Will (\$150–\$300), Rocket Lawyer, Nolo.
- Explain cost ranges.

Slide 15 — What You Get with Online Tools

Speaking Points:

- Guided forms.
- State-specific documents.

Slide 16 — Cost of Attorneys

Speaking Points:

- Simple will: \$300–\$1,000.
- Full estate plan: \$1,000–\$5,000+.

Slide 17 — When to Use an Attorney

Speaking Points:

- Complex families, large assets, special needs.
- Provide examples.

Slide 18 — Avoiding Scams

Speaking Points:

- Red flags.
- Protect personal information.

Slide 19 — Steps to Get Started

Speaking Points:

- List assets.
- Review beneficiaries.
- Choose POA agents.

Slide 20 — Final Thoughts & Q&A

Speaking Points:

- Recap key points.
- Reminder: I am not an attorney.
- Invite questions.