Fidelity Estate Planner®

Use this online service to gather and organize documents, learn about estate planning, make decisions, and find an attorney.

Why you should have an estate plan.

An estate plan isn't just for the wealthy, or only about money. It's about making sure your loved ones understand your wishes and that they're protected. An estate plan may be appropriate for you if you want to:

- Help preserve your assets
- Choose your beneficiaries and how they will receive assets
- Designate who will act if you are incapacitated or pass away
- Protect your family's privacy and possibly avoid probate
- Provide immediate access to liquidity, to pay bills in the event of incapacitation or death

The Fidelity Estate Planner® gives you:

An easy-to-use online experience	Go at your own pace, in the comfort of your home or office — we will tell you how much time each section will take.
A simple way to get organized	A series of questions helps you gather much of the information an estate planning attorney will need to document your plan. The notes section on each page helps you keep track of things you need to do and people you need to talk with along the way.
Education on estate planning	Learn more about estate planning, what documents you'll need, and important decisions you will need to make.
An Estate Planning Summary document	One document with all your information. Give it to your attorney, financial provider, and tax professional to make more efficient use of your time—and theirs.
Help finding an estate planning attorney	Guidance and tips to help find and work with an attorney to create or edit your plan, including questions to ask about fees and services.
Clear next steps to make sure your plan is complete	After your attorney completes your estate plan, we can help you make any necessary or recommended adjustments. This includes changes to your financial plan, beneficiaries, or interested parties.

Next Steps

Sign up at Fidelity.com/estateplanner

It’s easy to get started. Sign up at **Fidelity.com/estateplanner** — you will be asked to log in using your Fidelity.com account information. We’ll guide you through the process and help you become familiar with estate planning concepts.

Get organized

Having your financial information and decisions organized will save time and money when you create an estate plan with your attorney. Our Fidelity Estate Planner has made it easier to get all the details in one place, and ensure that you have addressed some of the critical decisions you will need to make.

Get your Estate Planning Summary

Once you’ve entered your details, you’ll be able to download a PDF of your Estate Planning Summary. You’ll also be able to share everything with your attorney.

Find and meet with an estate planning attorney[1]

The Fidelity Estate Planner can help you find an attorney through Avvo and can provide tips for choosing one that's right for you. You may consider using your professional network or personal contacts to identify attorneys with whom you could collaborate. Additionally, please review your employer benefits to determine whether they offer access to estate planning legal services at a discounted rate.

Meet with your Fidelity representative

Your Fidelity representative can help align your financial plan with your estate plan by updating beneficiaries and opening new accounts. You should also review your estate plan periodically to ensure that your information is up to date and that the plan still reflects your wishes.

Go to **Fidelity.com/estateplanner** or contact your Fidelity representative.

[1]The Fidelity Estate Planner® is not an attorney referral service. When applicable, participating attorneys, or their respective law firms, have not paid a fee or compensation to be included or listed in the Fidelity Estate Planner, nor does Fidelity receive any fee or compensation for providing the law firm and attorney contact information to its customers. Fidelity does not recommend or endorse any law firm or attorney listed in the Fidelity Estate Planner. Fidelity is not assessing your legal needs or providing legal advice in the Fidelity Estate Planner. There is no requirement that you select any of the law firms or attorneys in the list. You are free to select any law firm or attorney.

You know your preferences, goals, and individual situation better than anyone else. We want you to have the information you need to make your own informed planning decisions. Estate planning guidance is available from Fidelity through our planning specialists. Fidelity does not provide legal or tax advice. Any information provided is general and educational in nature and should not be considered legal or tax advice. Tax laws and regulations are complex and are subject to change, which can materially affect investment results. Fidelity cannot guarantee that the information provided is accurate, complete, or timely. Fidelity makes no warranties with regard to such information or the results obtained by its use, and disclaims any liability arising out of your use of, or any tax position taken in reliance on, such information.

The Fidelity Estate Planner® is educational in nature and not intended to serve as the primary basis of your estate and/or tax planning decisions.

Consult a legal or tax advisor as necessary to review your specific situation.

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