



# 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:

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# Next Steps



## Sign up at [Fidelity.com/estateplanner](https://www.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.



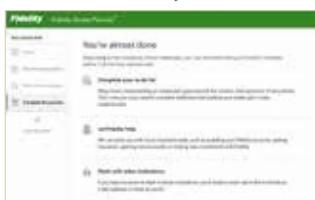
## Find and meet with an estate planning attorney<sup>1</sup>



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](https://www.Fidelity.com/estateplanner) or contact your Fidelity representative.

<sup>1</sup>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.

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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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