



CHRIS AND AMY'S ESTATE PLANNING ACTION PLAN

How many of you have argued with your partner over money? No matter what the current state of the American Dream is in your family, we've arrived at a point in time that is defined by this one, incontestable truth: how your family spends and saves money, and how that money flows needs to be talked about. Protecting and planning for your family's future should be a top priority in your life.

- Come Together As One and Talk About Money
- Increase Term Insurance for Chris to \$2 million
- Buy Term Insurance for Amy
- Establish a Living Revocable Trust
- Convert Traditional IRA to Roth IRA
- Add Amy to the Title of Your House.
- Download "4 Must-Have Documents"

Notes: _____
