

Bay East Consumer Guide

Your Home and Estate Planning

Protect your home and provide peace of mind for the people you care about.

Start Planning Early

Estate planning isn't just for retirement.

Create or update a plan when you:

- Buy a home
- Get married or have children
- Refinance or change ownership
- Experience other major life events

 Planning gives you more control over what happens to your home and assets.

What's Included in an Estate Plan?

An estate plan may include:

- ✓ A will
- ✓ A trust
- ✓ Durable power of attorney
- ✓ Other legal documents based on your needs

An estate attorney or financial planner help you create a plan for your goals and state laws.

Protect Your Loved Ones

Without an estate plan, state law determines who inherits your property.

Working with qualified professionals can help you:

- Avoid unnecessary probate delays
- Plan for mortgages or outstanding debts
- Reduce confusion for your family.

A plan can make the transition easier for those you leave behind.



"Planning today can provide peace of mind for tomorrow."

Your Home Matters

When planning your estate, consider:

- How your home is titled
- Whether there's an existing mortgage
- If the property is jointly owned
- Whether placing the home in a trust is appropriate

Understanding ownership today can help avoid confusion later.

We're Here to Help

A Bay East REALTOR® can help you:

- ✓ Understand how homeownership fits into estate planning
- ✓ Coordinate with trusted legal professionals
- ✓ Navigate ownership and title questions