

ARS Investment  
Partners

&

Advocacy Trust LLC



December 19, 2023

THE  
**FΦRGE**  
COMPANIES

# The Foundation for all Estate Planning

- **Question:** What is the foundation or building blocks for any estate plan?
- **Answer:** Last Will and Testament  
Revocable Trust  
Living Will/Healthcare Surrogate Appointment  
Financial Durable Power of Attorney  
HIPAA Release

# Lifetime Estate Planning Documents Everyone Needs

- **Question:** What are the most important estate planning documents to have while you are living and why?
- **Answer:** Living Will/Healthcare Surrogate Appointment  
Financial Durable Power of Attorney  
HIPAA Release  
  
These help you avoid conservatorships/guardianships

# The Importance of Revocable Trusts

- **Question:** Do I need to incorporate a revocable trust into my plan? What about the retitling of assets?
- **Answer:** A Revocable Trust is an incredible tool to help protect loved ones after our death and provide them with asset protection.

Don't worry about retitling assets.

# Special Needs Planning & Trusts

- **Question:** What are special needs planning tools?
- **Answer:** First Party Special Needs Trusts  
Third Party Special Needs Trusts  
ABLE Accounts

# Tennessee Trust Planning

- **Question:** Who should consider utilizing a trust situated in Tennessee and why?
- **Answer:** Business Owners and anyone with an interest in securing Asset Protection.