

Important Estate Planning Documents

Below is a list of important estate planning documents. Each of these play a specific role in managing an individuals or families estate and wealth strategy. It is important to review each of these annually and discuss any changes with the necessary professional(s) or family member(s).

- I. Last Will and Testament**
- II. Healthcare Directive (Living Will)**
- III. Power of Attorney**
- IV. Trust**
- V. Contracts**
 - Life Insurance Policies
 - Pensions
 - IRA's
 - Retirement Plans
 - Bank Accounts
 - Brokerage Accounts
 - Medical Records
 - Tax Returns
 - Titles/Deeds
 - Personal Collectables
- VI. Technology**
 - Websites
 - Archives
 - Passwords
 - Cell Phone Access
- VII. Other Professional Team Members**
 - CPA
 - Attorney
 - Investment Advisor
 - Banker

Who We Are

Stonebridge was founded in 1997, serving high net worth individuals, families and institutions with a sole focus on customized investment and wealth management strategies.

Philosophy

After thoroughly understanding your unique goals, we design a customized investment strategy focused on long-term financial success.

Firm Details

Total Firm AUM

\$1.7 Billion

Investment Experience

Over 40 Years

Investment Professionals

12

Designations

CFA, MBA, PH.D.

The information provided is only a sample and was generated as of 1/5/21. It may not reflect any one particular client's portfolio. Displayed is the model for the strategy. The composite is composed of individual stocks and bonds designed for client portfolios of similar investment objectives.

