

MEDIA SCRIPTS

COMPLETED VS READY

30 Second Script:

Some people believe their estate plan is finished once the documents are signed.

The will is in place. The trust is established. Everything feels complete.

What could be overlooked is whether that plan is actually ready to be used.

Would your family know what to do first? Would they know where to find everything? Would they feel confident stepping in?

Estate planning is not only about what is written. It is about whether your plan can be followed.

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Estate Readiness Checklist CTA: Visit our website or scan the QR code to access the **Estate Readiness Checklist** and see how prepared your plan may be.

MEDIA SCRIPTS

COMPLETED VS READY

60 Second Script:

Most people think estate planning is something you complete.

You meet with an attorney. Documents are signed. A binder is created. The process feels finished.

What could go unaddressed is whether that plan is organized, clear, and ready to be followed.

If something unexpected were to happen, would your family know what to do first? Would they know where to find important information? Would the people you have named feel prepared to step in?

In some cases, the gap is not the plan itself. The gap is how that plan would actually be carried out.

Estate planning is not only about documents. It is about making things easier for the people you care about.

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Estate Readiness Checklist CTA: Visit our website or scan the QR code to access the **Estate Readiness Checklist** to learn how clarity and organization could influence your overall plan.

MEDIA SCRIPTS

THE FIRST 72 HOURS

30 Second Script:

Estate plans are sometimes built around long-term outcomes.

What could be rarely discussed is what happens in the first few days.

If something unexpected occurred, would your family know who to call? Would they know where to start? Would they know what decisions need to be made first?

Clarity in those early moments could make a meaningful difference.

Estate planning is not just about distribution. It is about direction.

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MEDIA SCRIPTS

THE FIRST 72 HOURS

60 Second Script:

When some people think about estate planning, they think about what happens over time.

Who receives what? How assets are distributed. How a plan is structured.

What could be overlooked is what happens in the first few days after a major event.

Who does your family call first? Where do they go for information? How do they begin making decisions?

Even well-written plans could create confusion if those early steps are not clear.

Organization, accessibility, and simple instructions could potentially help reduce uncertainty during a difficult time.

Estate planning is not only about long-term outcomes. It is also about helping your family navigate the first steps with confidence.

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Estate Readiness Checklist CTA: Visit our website or scan the QR code to access the **Estate Readiness Checklist** to learn how preparation can influence your plan beyond the documents.



MEDIA SCRIPTS

THE PEOPLE YOU CHOOSE

30 Second Script:

Estate plans often name the people who will make decisions.

What may not be considered is whether those individuals feel prepared.

Do they understand their role? Do they know where to begin? Do they feel confident handling those responsibilities?

Choosing the right people is important.

Preparing them may be just as important.

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MEDIA SCRIPTS

THE PEOPLE YOU CHOOSE

60 Second Script:

A key part of estate planning may be selecting the people who will carry out your wishes.

Executors, trustees, and decision makers are identified and documented.

What may not be addressed is whether those individuals are prepared for the role.

Do they know what will be expected of them? Do they understand where information is located? Would they feel confident stepping in when needed?

Being named is one thing.

Being prepared is something else.

Estate planning is not only about assigning responsibility. It is about supporting the people who will carry it out.

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MEDIA SCRIPTS

ORGANIZATION AND CLARITY

30 Second Script:

You may have an estate plan in place.

The question is whether everything is organized in a way your family could follow.

Are documents easy to locate? Are accounts clearly identified? Would someone unfamiliar with your plan know what to do?

Organization could make a meaningful difference.

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ORGANIZATION AND CLARITY

60 Second Script:

Many estate plans could technically be complete.

Documents are signed. Accounts are established. Instructions exist.

What could create challenges is not the plan itself but how it is organized.

If information is scattered or difficult to locate, even a well-designed plan could become harder to follow.

Clarity and accessibility can help reduce delays, confusion, and unnecessary stress.

Estate planning is not only about having the right documents. It is about making those documents usable when they are needed.

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MEDIA SCRIPTS

MORE THAN DOCUMENTS

30 Second Script:

Estate planning is often thought of as a set of documents.

A will. A trust. A series of legal decisions.

What is sometimes overlooked is the experience your family may have when those plans need to be used.

Clarity, organization, and communication could influence that experience.

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MEDIA SCRIPTS

MORE THAN DOCUMENTS

60 Second Script:

Estate planning is sometimes often defined by the documents it produces.

Wills, trusts, and legal structures are important components of the process.

What those documents do not always capture is the experience your family may have when those plans are put into action.

Will things feel organized or confusing? Will decisions feel clear or uncertain? Will the process feel manageable or overwhelming?

Planning is not only about transferring assets. It is about shaping that experience.

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