

Understanding the People in Your Plan (Estate Documents)

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On this episode of Think Ahead, Katie Vercio and Kaeli Kaainoa discuss how they advise clients to choose people to name for various roles in their estate plan. This podcast covers Vercio's recent blog post "A Guide to Advanced Medical Directives" and goes more in-depth, using real-life examples of successes and challenges when those documents are put in force.

Some topics they cover include outlining the key elements of an estate plan, defining advanced medical directives and strategies for using them, and explaining what role your Evergreen advisor plays in your estate plan.

As always, thank you for listening!

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