



Estate planning at your fingertips



Getting our affairs in order is something we all know is important, but the reality is many of us put it off or feel it's too costly to do now.

Collegedale Credit Union's Digital Estate Planning Kit is an affordable digital tool designed to help individuals and their families get organized and be more prepared for the later chapters of life.

CCU's Digital Estate Planning Kit may help:

- Guide you through creating **important estate planning documents** like your last will & testament, power of attorney or a living will, even setting up things like a trust, guardianship for minor children, and directives for your pets
- Automatically catalog your assets, debts, and important documents in a secure and **customized digital vault** that can be accessed and updated at any time
- Provide a dynamic **view into your overall financial standing** and the ability to record and track any inheritance allocated to your loved ones

Create your
estate plan and
help ensure
your legacy is
protected for
\$199

\$36/yr thereafter as long as you
need the tool

At a fraction of the cost for typical attorney fees, this comprehensive solution helps guide you through creating everything you could need and likely some things you haven't even thought about.



Important documents

Create legally binding documents that will form your overall estate plan in minutes

- Last will and testament
- Power of attorney
- Pet trust and instructions
- Guardianship directions
- Final instructions
- Living will
- Instructions for property distribution and more



Digital document vault

Keep everything safe in a secure digital vault — accessible at anytime

- **Estate documents** that you have created and/or uploaded when building your estate plan
- **Titles and deeds** such as any car titles and your property deeds
- **Insurance policies** for coverages like your house, car and life insurance can all be stored



Your legacy

Create a digital album that can be shared with loved ones for generations to come

- **Stories:** Catalog defining life events, and maybe even throw in some funny tidbits
- **Life timeline:** Highlight those important events against a neat timeline tracker

A lot of cool tools and dashboards are also included

CCU's Digital Estate Planning dashboard provides access to all the documents and data you have created whenever you want while providing a snapshot of other useful information, helpful at different stages of your life journey, including:

Estate snapshot

Where you stand at any given point with respect to your assets and liabilities; how they will be distributed; as well as a list of all those personal items that have been accumulated

Knowledge section

Insights, 'how-to' articles, and videos on a variety of topics around estate planning to do's

Tools & calculators

Keep track of what has been allocated and to whom, including visibility to your ongoing and changing life expenses and insurance needs

Stay current

With unlimited ongoing access to the platform as long as your subscription is active, you can plan at your own pace and make updates as needed when life changes happen.

Interested in learning more?

https://www.collegedale.org/financial_estate-planning.htm