

Meet Your Estate Planning Team

Players	What Do They Do?	Role in Estate Planning Process
Financial Advisor	Analyzes your financial goals and investment objectives in light of your current situation and economic conditions.	Helps to ensure there are ample resources available at death to pass on to your loved ones or charities.
Insurance Professional	Provides analysis of current and future insurance needs.	Provides products to ensure there is cash available to carry out your after-death wishes.
Accountant or CPA	Analyzes current tax position as well as implements strategies for future tax planning opportunities.	Ensures that estate planning is done with consideration of the tax consequences to you and your loved ones.
Spiritual Advisor	Provides insight and guidance on what moral, personal, or spiritual values are most important to you.	Helps to identify important values to share in your planning through the use of lessons, stories, or experiences. Provides context for your family about why an estate or financial plan is designed in the way it is.
Estate Planning Attorney	Creates and implements legal strategies.	Arranges your legal affairs so that trusted people are authorized to make decisions for you when you cannot, and your money and property are handled and given to your loved ones in the way you want after your death.

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Consult with a qualified professional before making any legal, tax, or investment decisions.