

How Can Trust Services Help You?

A Pennsylvania Estate Planning Checklist

Journey Bank's Trust & Estate Services team offers a no-obligation first meeting to walk through your checklist and answer your questions.

Checklist – Check All That Apply

- ☐ I am concerned that a nursing home will eat up all of my hard-earned assets
- ☐ I own Pennsylvania real estate that I'd like to **keep out of probate**.
- ☐ I have minor **children or grandchildren** I want to provide for over time, not all at once.
- ☐ I have a family member with **special needs** who receives (or may need) government benefits.
- ☐ I'm concerned about a **beneficiary's creditors**, divorce, or spending habits.
- ☐ I own a business and want a **plan for continuity** or succession.
- ☐ My estate (home, accounts, and other assets) is worth more than \$50,000.
- ☐ I want to name someone to **manage my finances** if I become unable to do so myself.

Scoring Guide

0-1 checked

A will-based plan may be sufficient for now. Worth a conversation to confirm.

2-3 checked

A trust could add meaningful value – probate avoidance or added control are likely worth exploring.

4+ checked

A trust is very likely a strong fit. Let's build a plan around your specific goals.

What to Bring to Your First Meeting:

Any Estate Planning Documents You Currently Have.

Ready to Talk Through Your Plan?

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