

Make a List

- List your assets (what you own).
- List your liabilities (what you owe).
- Identify ownership (sole, joint, trust, etc.).
- List documents you have and where they are located.

Make a Plan

- Who will handle your affairs when you're gone?
- Who will get your belongings and financial assets and when?
- Who will make medical and financial decisions when you can't?
- Who will be the guardian for your minor children?

Take Action

- Meet with NB Trust and Wealth Management to set the course.
- We will guide you through the process and suggest documents that may be needed.
- We will collaborate with the professionals needed to execute your plan.

Contact Us

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