NB Trust & Wealth Management

Estate Planning Guide

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

NB Trust & Wealth Management
101 Hubbard Street, Blacksburg, Virginia 24060
(540) 951-6203
rjuidici@nbbank.com