



## WORKSHEET

# Suze Orman's Must Have Documents

I have created a comprehensive collection of tools that will help take the worry out of protecting you, your assets, and your family. The Must Have Documents is an online program that offers all 4 'Must Haves'. The software utilizes a simple questionnaire process to take you step-by-step through the creation of your own fully customized legal document—valid in all 50 states.

### THE MUST HAVE DOCUMENTS include:

1. A Living Revocable Trust
2. A Will
3. A Durable Power of Attorney for Health Care
4. An Advanced Directive

## Here's How It Works:

### ○ Step 1: **PERSONALIZE**

You will simply respond to an easy-to-answer questionnaire that will automatically select the correct must-have documents for you.

This is not a one size fits all program! For example: A trust for a married couple is different than a trust for a single person. You answer specific questions and the program selects what documents are relevant for you and your situation.

Choose the document you want to work on and simply answer questions.

### ○ Step 2: **PREVIEW**

Audio and visual explanations will take you paragraph by paragraph through the document you are working on. **It doesn't get any easier.**

○ Step 3: **PRINT and PROTECT**

You will print out the documents along with the instructions showing you where to sign, notarize if needed and anything else you must do to make sure your documents are complete.

**Congratulations!** Now, all you have to do is keep your completed documents in a safe place that you or a loved one can easily access when needed.

It really is as simple as 1-2-3

Get the  
**MUST HAVE DOCUMENTS** >

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