



THE ROLE OF YOUR NAKAMUN ADVISOR

The Nakamun Group provides Estate Planning as a service to our clients. The role of your Nakamun Advisor in Estate Planning includes:

- Identify your Estate Planning needs
- Assess your current financial situation, existing documents relative to your estate, and insurance products
- Work with you to develop a strategy and plan to meet your Estate Planning needs
- Coordinate the services of your lawyer and accountant and work with them to ensure your plan is implemented

If you do not already have a lawyer and accountant, we will recommend ones who we know are knowledgeable and experienced in Estate Planning services.

