

Who Is This Guy Talking?

- Father
- Tennis Player
- Amateur Chef
- Small Business Owner
- Attorney



What Life
Usually
Looks Like



Last Will and Testament
of _____

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LAST WILL AND TESTAMENT

Everyone Has One of These, Right?

Strategies to Take With You Today



Ways Grandparents can
help their Grandchildren



Check Your Beneficiary
Designations

How Can Grandparents Help Out Their Grandkids?

529 Plan

Direct Tuition Payments

Other Options?

- Fixed Index Life Insurance Policies
- Other Creative Ideas from Tony?

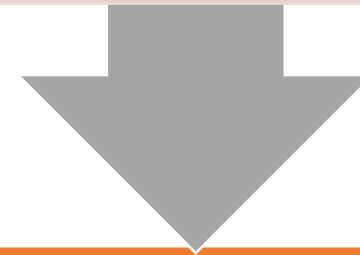
Beneficiary Designations

Major Life Events

Marriage

Divorce

Child or
Grandchild
Born



At least once a year



S O C I A L
M E D I A

Strategies For Social Media Accounts

What
Happens to
Your Social
Media
Accounts?



Preparing a profile memorialization option,
should debut sometime in 2020

What
Happens to
Your Social
Media
Accounts?



Allows you to designate a digital “heir” to
manage your account after you’re gone.

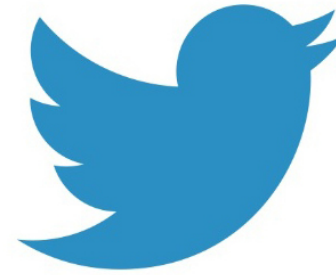
* You can also choose to have your account deleted after you die. *

What
Happens to
Your Social
Media
Accounts?



Photos and videos remain visible,
but they won't appear in searches anymore.
Owned by Facebook, so their policies will be similar...

What
Happens to
Your Social
Media
Accounts?



Will delete an account upon a family member's request

What
Happens to
Your Social
Media
Accounts?

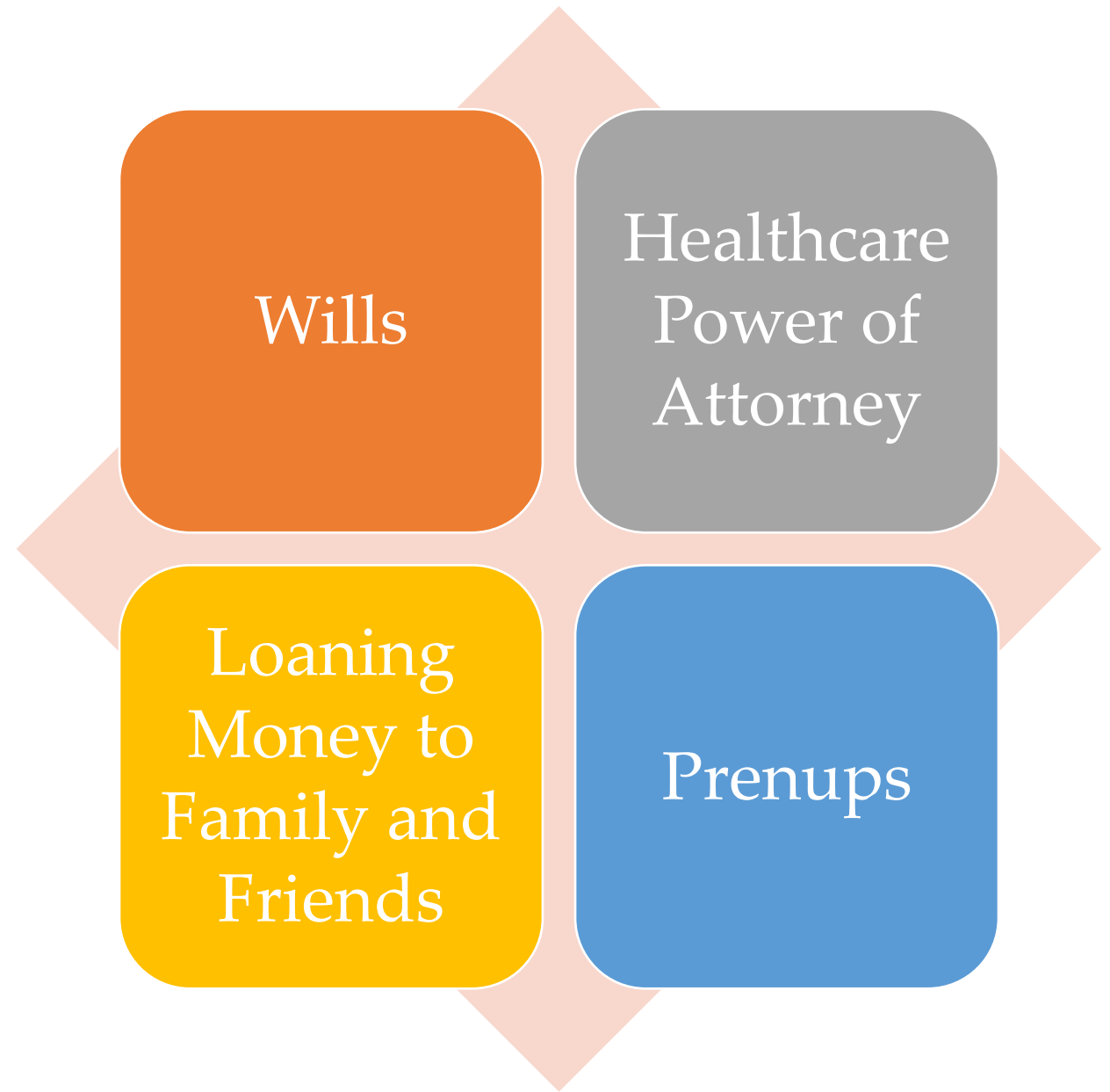


Anyone can request to have the account removed with proof that the user has died.



Documents
You
Shouldn't
Buy Online

Some
Documents
You
Shouldn't
Buy Online





Working with Tony & Andrew

** Not an actual client of Tony or Andrew*





www.AndrewMAyers.com/WellsFargo