

PLANNING YOUR ESTATE

5 STEPS TO CONSIDER



MAKE A LIST

Record your assets and include the value and location. Note beneficiary designations and ownership liability. Store important paperwork in a secure place and inform important people of the location.



DETERMINE YOUR LEGACY

Think about what you want to accomplish: Who do you want to leave your assets to and for what purpose? Consider future generations, healthcare needs, and charitable giving.

IDENTIFY KEY ROLES & BENEFICIARIES

Determine who will execute your plans, who will be guardian of your children, who will receive your assets, and what charities you want to support. Discuss your plans with these key people.



MAKE IT OFFICIAL



For simple estates, we have partnered with FreeWill to get you started.
freewill.com/playhousesquare
For more advanced estate planning, seek professional assistance from a qualified attorney. Review your plan every three years or after a major life event.

LEAVE YOUR LEGACY

Please consider including Playhouse Square in your estate plans to connect and inspire future audiences.



SCAN FOR LEGACY CIRCLE