



JOHNS HOPKINS
UNIVERSITY

Financial
Health

Schedule a consultation to speak to a financial coach from Marsh McLennan Agency (MMA) regarding any questions that are specific to your individual financial needs. JHU has partnered with MMA as a trusted partner to guide you on your financial journey.



Various financial topics can be discussed including:

- Your Employer Retirement Plan
- General Investment Questions
- Social Security
- Debt/Budgeting
- Employee Benefits & Insurance
- Review Tools Available on the Prosper Wise site
- Pre-Retirement Planning

The Essential Guide to Estate Planning

Whether you're just getting started in your career, a new parent, or an entrepreneur, having a comprehensive estate plan can provide peace of mind by outlining your preferences for medical care, financial management, and the distribution of your assets. By planning ahead, you can avoid the default state rules that may not align with your desires and ensure that your legacy reflects your values.

Ready to take control of your future? Let's dive into the essentials of estate planning and discover how you can safeguard what matters most to you!



The Emotional Importance of Estate Planning

Taking control of your future through estate planning is not just a practical step; it's an emotional safeguard for your loved ones.

This guide will help you navigate the essentials of estate planning, covering key documents like wills, trusts, and powers of attorney. You'll learn how to gather important information and make informed decisions, ensuring your legacy reflects your values. Let's explore how to create a personalized estate plan that gives you and your family the security and peace of mind you deserve.



Preparing an Estate Plan

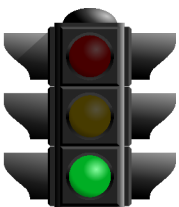
This course emphasizes the importance of estate planning for individuals at all life stages, from college students to retirees. It defines estate planning, outlines its benefits, and discusses the risks of not having a plan. Participants will learn key terms, common documents, and a general checklist for creating an estate plan tailored to their unique situations. The course also highlights common mistakes to avoid, equipping attendees with the knowledge to ensure their wishes are respected and providing peace of mind for themselves and their loved ones.



Take the Course

What you'll learn

- What happens when you pass away without an estate plan
- Common estate planning documents
- The role of taxes in estate planning
- What an estate plan can do
- Key terms and parties
- How to identify what documents you need



Getting Started on Your Estate Plan

An estate plan is a written set of documents that communicate your wishes and ensure your loved ones know your final plans concerning your health care, how to distribute your assets, and what to do if you become incapacitated. By being proactive with your estate plan, you can ensure that your wishes are carried out in the most cost-effective and tax-advantageous ways possible. A key to a successful estate plan is to lay a solid foundation for it. Here is what you can do to get your estate plan started.



Financial Well-Being Webinar



Scan to
register for
the webinar

Financial tips for different life stages and ages

Join us for an insightful panel discussion focused on navigating the financial landscape at various life stages. Whether you're a young adult just starting your financial journey, a parent managing family expenses, or a retiree planning for the future, this session will provide valuable tips tailored to your unique circumstances. Don't miss this opportunity to empower yourself with the knowledge to make informed financial decisions at every stage of life!