



FUTURE CARE FUNDING

W MORGAN ADVISORY

# Irrevocable **FUNERAL** EXPENSE TRUST

## WHAT IS AN IFET?

An Irrevocable Funeral Expense Trust (IFET) allows you to set aside funds for your end-of-life expenses, so your loved ones don't have to cover these costs. The amount within the trust is protected from potential creditors, and policies with a face value below a state-specific limit (\$15,000 in most states) is considered exempt for Medicaid and VA benefit purposes.

**SECURE YOUR FINANCIAL FUTURE AND ACHIEVE PEACE OF MIND FOR BOTH YOU AND YOUR LOVED ONES.**

### EXAMPLES OF QUALIFIED EXPENSES

Expenses that can be paid for using IFET funds include:

- \* Funeral services
- \* Casket
- \* Burial services
- \* Embalming and preparation
- \* Cremation
- \* Headstone

### BENEFITS OF FUNERAL EXPENSE TRUSTS

In addition to preserving funds for future funeral and burial services, benefits of IFETs include:

- \* Peace of mind that your loved ones won't have to cover these costs
- \* Flexibility to use the funds at any funeral home in any state
- \* No obligation to choose specific services ahead of time
- \* Funds available to use as soon as 24 hours after passing

## WHO ARE IFETS APPROPRIATE FOR?

Funeral Expense Trusts are an essential staple for any estate plan, whether you're planning ahead for retirement or long-term care, or you're pursuing Medicaid eligibility or VA benefits. No matter your situation, an IFET gives you some extra financial protection and peace of mind for your end-of-life needs.

**CONTACT ME IF YOU'D LIKE TO LEARN MORE ABOUT  
IRREVOCABLE FUNERAL EXPENSE TRUSTS**

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