



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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