



JESSUP WEALTH
MANAGEMENT

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Market Update

As updates regarding the tragic geopolitical conflict continue to unfold, we encourage you to click the link below and watch our March Market update. We talk through the current effects we are seeing in the markets and what we feel, in our opinion, is in store for this forward-looking market over the next few months.

<https://youtu.be/8FD00Ay7pws>

**Our weekly Podcast covers investor questions!
We would encourage you to subscribe!**

MARK MCEVILY

MATTHEW JESSUP



THE INDEPENDENT ADVISORS

OUR WORLD OF FINANCIAL MARKETS &
FINANCIAL PLANNING

EST. 2019

“The Independent Advisors” podcast produced by Mark McEvily, Matt Jessup and Jenna Rittenhouse focuses on investing and financial planning. You will hear tips, tricks and strategies to address your financial well-being and most importantly, conveyed in a way that everyone can understand.

The podcast is available through Apple Podcasts (iTunes), Amazon Music (just ask Alexa to "play the Independent Advisors podcast"), Spotify, Breaker, Stitcher, IHeartRadio & YouTube. There is a tab on our website (www.jessupwealthmanagement.com) dedicated to the podcast where you will be able to find links to every episode. You can also subscribe by email at www.blubrry.com/the_independent_advisors/

We are taking listener questions! Email, inquiries@jessupwealthmanagement.com, for anything you want us to explain, debate or highlight in our weekly podcasts!

Financial Planning Topic of the Month

By: JWM Wealth Advisor, Taylor Ledbetter

Estate Planning

Estate planning is a key area when it comes to understanding financial planning. A good starting point to expanding your estate planning knowledge, is to start with the core documents that are typically involved.

The first document is called a Will. Most people will be familiar with a will because it is used the most. A will allows you to direct who will receive your property upon your death and under what circumstances. It allows you to direct the payment of estate and tax expenses. You are also allowed to designate a guardian if you have minor children. If you pass without a will, your heirs may have to spend additional time and energy to settle your affairs once your gone.

The second document is called a Durable Power of Attorney (POA). This document allows you to authorize someone, called an agent, to handle your financial matters if you were to become incapacitated. The agent may be given a broad or limited authority to make

decisions about your property, finances, investments, or medical care. If you don't have a durable POA, your family members would have to institute legal proceedings and request a probate court to appoint a guardian to carry out these responsibilities. By delegating an agent to act as your POA in advance, you and your family can avoid the probate process all together.

The third document is called a Healthcare POA (and/or living will). You authorize an agent to handle your health care needs that is consistent with your intentions in the event you become incapacitated. This includes permission for the agent to make decisions regarding the continuation of life support and general health care decisions that may arise. There is also a document called a Living Will. This specifically spells out medical treatments you would and would not want to be used to keep you alive. It also relieves a burden off of your family members, so they don't have to make that decision while you are incapacitated.

Estate planning documents are important for everyone. You never know when something unexpected may happen. It is best to plan in advance and understand what provisions you may need to put into place. By having these documents, you are able to carry out your wishes after you pass and make sure your loved ones receive the assets they deserve.

Our growth allows us to advise more clients!

We have added amazing new hires to the team and are even increasing our physical office footprint! This growth equips JWM with all the tools to allow us to advise more clients, while maintaining the premium quality of service we pride ourselves on! We would greatly appreciate your client referrals. Let us care for those you care about!

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