

# Preparing to design your Estate Plan

If you decide to go forward with your Estate Plan, we will discuss the following topics at your initial conference:

Notes

1.	A HealthCare Power of Attorney which names Agents (spouse, children, friend) to make health care decisions for you when you are unable to do so.	
2.	A HIPAA form authorizing medical personnel to release your medical information to your Agents and family members.	
3.	A Living Will which states your end-of-life wishes.	
4.	A Revocable Living Trust in place which avoids Probate Court and takes care of your family and property in the event of your incapacity or death.	
5.	A Financial Power of Attorney which names Agents to manage your non-trust property (retirement accounts, pensions, annuities, etc.) if you are incapacitated.	
6.	Funding your Revocable Living Trust by titling your assets in the name of the Trust.	
7.	Designating Primary and Contingent beneficiaries for all of your retirement accounts, annuities and life insurance policies.	
8.	Minimizing possible federal estate tax on your property upon your death.	
9.	Protecting your children's inheritance in the event that your spouse chooses to remarry.	
10.	Protecting your children's inheritance from their creditors, their divorces, and their own mismanagement.	
11.	Clear instructions for the distribution of your property so that contests and disputes will be avoided at your death.	
12.	Organizing estate planning documents and financial information so as to ease the administrative burden on your Successor Trustees and Agents.	
13.	Successor Trustees and Agents can easily locate your estate planning documents and financial information.	
14.	If you have minor children, naming guardians for them, providing instructions to the guardians, and setting up trusts for your children's inheritances.	