



Trusts, Wills, Probate, How to Plan for Life

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San Xavier Allottees Association Annual Meeting

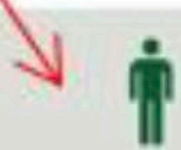
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What is a Will and Why Do You NEED IT?

- A Will is a legally binding document that is a written testament of a person's last wishes
- Wills tell the Court how the property and Estate is to be divided and distributed
- A Will is the least thing you can do to help the transition, and can also include helping supplementary documents such as Medical Directives, Power of Attorney, and Burial Directives
- IF YOU DO NOT HAVE A WILL IN PLACE AND OWN A SMALL FRACTIONATED INTEREST IN AN ALLOTMENT, THE GOVERNMENT WILL DECIDE FOR YOU



Original
Low



FRACTIONATION



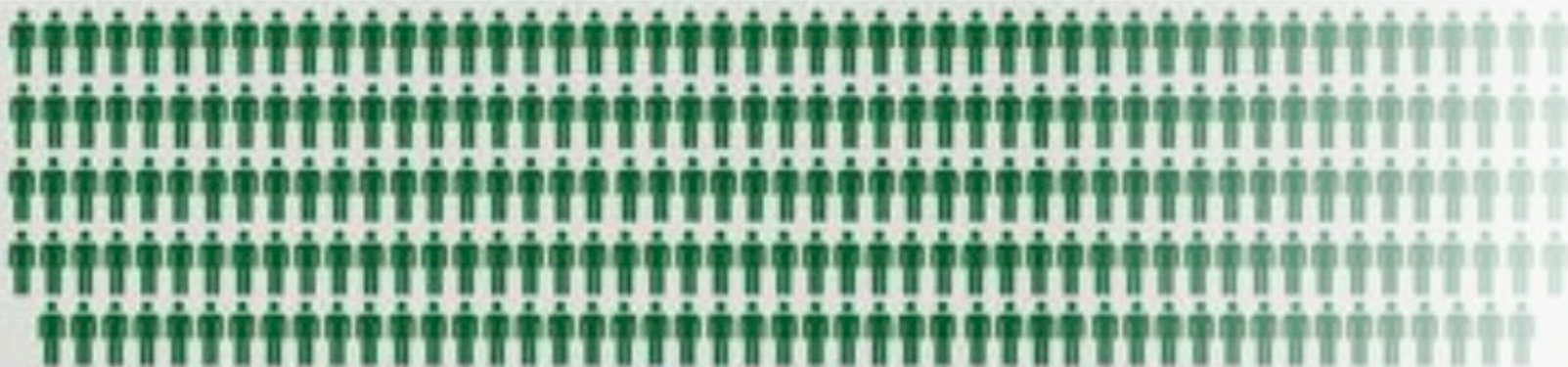
Third
90%



- General Allotment Act of 1887, reservation land was divided up and allotted to individual Tribal members



- American Indian Probate Reform Act "AIPRA" changes the way trust estates are distributed to your heirs after your death.



Sixth
243%



PROBATE

- A lengthy multi-step process that occurs after someone has died
- An administrator works with the court to divide and distribute the deceased's estate
- Depending on the decedent's estate there could be one (1), two (2) or even three (3) different Courts to have to do a Probate matter in for San Xavier Allottees

Some Simple Things You CAN DO

01

Designate a
Beneficiary on your
bank account

02

Designate your
beneficiaries through
insurance and
pensions (WILLS do
not affect this)

03

Have a discussion
with loved ones about
your wishes regarding
organ donation, end-
of-life care, long term
care, cremation,



What is a Trust

- A Trust is a legally binding document, like a contract, that allows a third party to hold property to distribute and transfer to designated beneficiaries in private according to the guidelines and rules setup by you
- Trusts are not just for the wealthy, it is for anyone who wants to help their loved ones not have to go through probate

SXAA Can Help You and Your Family

Wills Service

Medical Directives,
Power of Attorney,
and Burial
Directives

Trusts

Probate Forms