CLIENT NAME

Remote Signing

Your Family

Unmarried/ Married

children under 18

Your Assets

House with mortgage

401k

Investments

Mineral Rights

Several Bank Accounts

Your Goals

Transfer wealth to kids

Make it easy after death

CAUTION

YOU SIGN YOUR NAME____ TIMES

INITIAL EACH PAGE OF WILL AND TRUST

NOTARY MUST SIGN, DATE, AND PRINT NAMES TO MAKE THESE FORMS COMPLETE

2 WITNESSES MUST NOT BE NAMED ANYWHERE IN THE PAPERS OR HEIRS

ESTATE PLANNING PACKAGE

LINK TO YOUR PACKAGE

CHECKLIST FOR WILL

- ❑ PRINT Single Sided
- ❑ Check YOUR Name
- ❑ Check YOUR Family Names and Relationships
- ❑ Check YOUR Executor(s)
- ❑ Read it completely

- ❑ Get 2 Witnesses that are not listed anywhere on the forms or heir to the Testator
- ❑ Meet with a Notary

<u>Signatures, Initials, and Date</u>

- ❑ Initial 9 times at the Bottom RIGHT side -"Testator's Initials _____"
- ❑ Sign YOUR name TWICE on Page 8 and 9

- ❑ Witnesses sign THREE times on Page 8 and 9

- ❑ Notary signs and stamps ONCE on Page 9
- ❑ FULL date is listed THREE times on Page 8 & 9

Will

LINK to YOUR Will

9 pages

<u>Signatures</u>

YOU: 2

YOUR Initials: 9

2 Witnesses: 3

Notary: 1

Date: 3

CHECKLIST FOR TRUST

- ❑PRINT Single Sided
- ❑Check YOUR Name
- ❑Check YOUR Family Names and Relationships in Article V
- ❑Check YOUR Trustee(s) in Article VII
- ❑Read it completely

- ❑Meet with a Notary

Signatures, Initials, and Date

- ❑Initial NONE
- ❑Sign YOUR name FOUR times on Page 15 and 17

- ❑Witnesses NONE

- ❑Notary signs and stamps TWICE on Page 15 and 16
- ❑FULL date is listed FIVE times on Page 1, Page 15, 16, & 17

Trust

LINK to YOUR Trust

17 pages

Signatures

YOU: 4

YOUR Initials: 17

Witness:

Notary: 2

Date: 5

WARNING:

MUST fund the Trust by titling 1 asset – Name of asset

CHECKLIST FOR MEDICAL POWER OF ATTORNEY

- ❑PRINT Single Sided
- ❑Check YOUR Name
- ❑Check YOUR Family Names and Relationships in Article V
- ❑Check YOUR Trustee(s) in Article VII
- ❑Read it completely

- ❑Meet with a Notary

Signatures, Initials, and Date

- ❑Initial NONE
- ❑Sign YOUR name TWICE times on Page 5 and 8

- ❑Witnesses sign TWICE times on Page 5 and 6

- ❑Notary signs and stamps ONCE on Page 6
- ❑FULL date is listed FIVE times on Page 5 and 6

Medical POA

LINK to YOUR Medical POA

8 pages

Signatures

YOU: 2

YOUR Initials: NONE

Notary: 1

Date: 2

WARNING

Make Copies and give to people and your doctors

CHECKLIST FOR DURABLE POWER OF ATTORNEY

- ❑PRINT Single Sided
- ❑Check YOUR Name
- ❑Check YOUR Agents Name and Contact
- ❑Check YOUR Successor Agents and Contact
- ❑Read it completely

- ❑Meet with a Notary

<u>Signatures, Initials, and Date</u>

- ❑Initial NONE
- ❑Sign YOUR name ONCE times on Page 4

- ❑Witnesses NONE

- ❑Notary signs and stamps ONCE on Page 4
- ❑FULL date is listed ONCE on Page 4

Durable POA

LINK to YOUR Durable POA

6 pages

<u>Signatures</u>

YOU: 1

YOUR Initials: NONE

Notary: 1

Date: 2

<u>WARNING</u>

Initial on A-O on Page 1 & 2

Initial Instructions Page 2 & 3

CHECKLIST FOR APPOINTMENT OF DISPOSITION OF REMAINS

- ❑PRINT Single Sided
- ❑Check YOUR Name
- ❑Check YOUR Agents Name and Contact
- ❑Check YOUR Successor Agents and Contact
- ❑Read it completely

- ❑Meet with a Notary

Signatures, Initials, and Date

- ❑Initial NONE
- ❑Sign YOUR name ONCE times on Page 2

- ❑Witnesses NONE
- ❑AGENTS Sign on Page 3 at any time before death

- ❑Notary signs and stamps ONCE on Page 3
- ❑FULL date is listed ONCE on Page 3

Disposition of Remains

LINK to YOUR Disposition of Remains

3 pages

Signatures

YOU: 1

YOUR Initials: NONE

Agents:

Notary: 1

Date: 2

WARNING

Agent MUST accept Appointment by Signature

Can be anytime before death

Assets that can be transferred without a court order include:

- Life insurance.

  The insurance company makes the check out to whomever you listed as your **BENEFICIARY.**
- Pension benefits, retirement plans, or IRA accounts.

  The company makes the check out to whomever you listed as your **BENEFICIARY.**
- Cars titled in certain Texas counties.

  The local DMV is authorized to retitle the car in the name of whomever shows up with the old title and swears on penalty of perjury that he is your heir.

  The co-owner becomes the owner upon death with a death certificate on title if signed under the **JOINT TENANTS WITH RIGHT OF SURVIVORSHIP**.
- Bank Accounts

  The bank simply makes the check out to whomever is listed as **PAID ON DEATH.**

  The co-owner becomes the owner upon death with a death certificate on accounts listed **JOINT TENANTS WITH RIGHT OF SURVIVORSHIP**.

  Signers are NOT co-owners or beneficiary.
- Stocks, Bonds, and most Mineral Rights

  The bank simply makes the check out to whomever is listed as **TRANSFER ON DEATH.**
- Clothing, furniture, books, electronics, jewelry, and other similar items, if your spouse and family and friends will be able to divvy them up without significant argument. (Often, simply showing them an unprobated will or even just a letter that directs what is to be done with these items can settle any arguments.)

WAYS TO STAY OUT OF PROBATE

When you acquire new assets of any kind you need to remember that you have a Trust and take steps to include it in the Trust upon acquiring it.

If you do not want it in the Trust, take steps to keep it out of probate.

Life Changes all the Time

Contact me with any questions:

Cristal Robinson, JD/ MBA

Pronouns: she/ her/ hers

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