

Considerations for Your Consultation

Steps to Help You Prepare:

1. Gather and review all the documents and information related to your estate.
Key documents and information such as:
 - a. Full legal names and contact information for your family members and trusted individuals who will serve in your Estate Plan;
 - b. Birth, death, marriage & divorce dates;
 - c. Deeds for Real Estate;
2. Begin gathering the following for your final plan:
 - a. Bank account numbers;
 - b. Investment portfolio account numbers;
 - c. Retirement account numbers;
 - d. Life insurance policy/plan numbers;
 - e. Your advisors such as a banker, broker, investment advisor, or insurance agent. Include their company names and addresses.

What To Consider When Planning:

- What are your estate plan objectives? If you died tomorrow, what would you want to happen?
- **Financial Agents/Powers of Attorney (\$):** Who will you select to manage the financial affairs of your Estate after your incapacity or death? (Trustee, Executor, and Agent Under Durable Power of Attorney)

Note: Consider naming at least 1-2 alternates in case the named individual is not able to act. You may wish to speak to these people to be sure they will agree to act, but you should do so after you meet with your attorney.

- **Health Care (♥):** Who will you appoint to make medical and personal care decisions for you if you are unable?
- **Health Care (♥):** Have you made decisions about your end-of-life wishes for continued health care and resuscitative measures?
- **Health Care (♥):** Will you be an organ donor after death?

- **Personal Care (♥):** Do you have any specific religious affiliations or wishes to be followed?
- Have you made after-death decisions about burial or cremation? Have you made pre-paid plans?
- Do you want to leave specific gifts of property or cash to certain individuals?
- **Beneficiaries:** To whom do you wish to provide trust assets? Spouse? Children? Extended Family? Friends? Charities? Pets?
 - If property is being left to children, are they to receive it immediately or at some future time? *Note: If the children are minors, you might want to specify later ages for distribution. Discuss these options with your attorney.*
 - Would you like some custom protective provisions for beneficiaries with potential areas of concern, such as: spending issues or financial immaturity, divorce/remarriage, addiction issues?
 - Do you have any beneficiaries with special needs or receiving public assistance benefits or who have a Special Needs Trust?
 - Do you have specific tangible items or family heirlooms that you wish to be given to a specific person?
- Will you be disinheriting anyone?
- If one of your beneficiaries dies before you, how do you want their share divided? Would the assets then drop to that person's children (if any) or instead be distributed to another named individual or group?
- Who will you name as a guardian for dependent children or disabled adult children? If that person does not reside in California, is there someone who can take immediate temporary custody of your children in an emergency?
- If this is not your first marriage and you have children from another relationship, you may wish to consider distribution on the first spouse's death, such as:
 - All to your spouse absolutely;
 - All to your children absolutely;
 - All to your spouse for their use while alive, and after their death, to your children;
 - All to your children and the children of your spouse.
- It is very important that you and your spouse discuss the various options and agree upon your plans. You will discuss these details at your design consultation.