



Dear Clients,

Thank you for choosing TransGlobal Advisory, LLC to assist you with your estate planning needs. Your estate plan is an important part of completing your overall financial plan and provides you the ability to control aspects of your financial life that are important to you.

A trust-based estate plan will give you control over who is getting your assets, how are they getting them, who will make financial and health care decisions if you cannot, and who would take care of your minor children in your absence, if applicable.

We have partnered with a nationwide firm, EncorEstate Plans, that works with law firms in each state and leverages technology and estate planners on their team to create the state specific documents your family needs. They will be assisting me and you in reviewing existing trust and will documents, creating new documents, and making updates in the future when life events cause existing plans to become out of date.

As you know, we are not acting as your attorney, but we can facilitate the creation of your estate plan by providing you the legal information you need to make good decisions to complete the estate planning process.

Enclosed, you will find a few documents to help us get started to complete your estate plan. Please review and complete the documents carefully, and feel free to reach out to us with any questions.

Sincerely,

TransGlobal Advisory, LLC



Introduction to Estate Planning

Estate Planning is an essential component to your overall financial plan. It allows you to gain more control over aspects of your life both during your lifetime and after your death. The goal of this document is to prepare you for the questions you will need to answer while completing your estate plan.

There are five major decisions that go into each estate plan. Those decisions are described below, along with examples and a description of people in your life that may be up to the task.

1) Beneficiaries – This is WHO will get your assets when you pass away. Generally, if you have children, we see to it that things go to your children in equal shares. However, there are also opportunities to leave things to charity (via a specific dollar amount after a death), or to other loved ones.

2) Method of Distribution – This is HOW your beneficiaries will get everything when you pass away. Depending on the age and financial capabilities of your beneficiaries, you may wish to delay distributions to a beneficiary. For example, for young beneficiaries, we often see clients give it in stages (1/3 at 25, 1/3 at 30, and 1/3 at 35). Please keep in mind that those young beneficiaries will have immediate access to funds for health care, education, and support. If you have a beneficiary with special health needs, you can leave assets for them through a special needs trust.

3) Successor Trustee/Executor/Financial Power of Attorney – This is the person (or people) who will make financial decisions for you in the event you cannot. The type of person who makes a good trustee is someone who is financially responsible, would handle finances similar to you, and is generally a good decision maker. If you do not have a family member or friend who fits the bill, you can consider a professional trustee. Generally, there are 2-3 successors named (in order of preference).

4) Health Care Power of Attorney – This is the person (or people) who will make health care decisions for you in the event you cannot. The type of person you name here would need to be able to make decisions during a difficult, emotional time. You will have the ability to state your end of life and organ donation wishes in this document as well. Generally, there are 2-3 successors named (in order of preference).

5) Guardian (if necessary) – This is the person (or people) who will have legal custody of any minor children should you pass away. The guardian will work with the trustee to access funds for any minor children. We often see your parents, siblings, or dear friends named here. We also see other children you have that are over the age of 18 named here. Generally, there are 2-3 successors named (in order of preference).



WILL V. TRUST

One of the most common questions we get is “What is the difference between a will and a trust?”. There are a few similarities, but a lot of differences also. In both cases, these documents are a part of your estate plan – to have a complete estate plan, there are also powers of attorney for medical and financial purposes and other documents needed.

Similarities between a will-based plan and a trust-based plan:

Exercising Control: Both a will and a trust allow you to control who gets your assets at your death, how those people/entities get your assets, and who is in charge of making financial decisions at your death. The levels of control do vary with trusts enabling more control.

Amendments: Both wills and revocable trusts are “set in sand”, meaning you can change them provided you have the mental capacity. Both documents are “set in stone” upon your incapacity or your death.

Differences:

Probate Avoidance: A trust will avoid probate if funded properly. A will does NOT avoid probate - it merely tells a probate court where the assets go.

Public v. Private: In most states, probate is costly, time intensive, and most documents are public record. If done properly, trusts will be far easier to administer and can be done privately.

Control during your Lifetime: A trust allows you to control what happens now, if you become incapacitated, and what happens at your death. A will only controls what happens at your death.

Cost: One of the biggest knocks against trusts is that they are supposedly a lot more expensive to set up than wills. This is no longer the case if done correctly.

Other Items:

Why do I need a will if I already have a trust? When you have a trust-based estate plan, you also have a will. If you did not put all of your assets into your trust, the will would govern at your death. The beneficiary of your will is your trust – this is what is referred to as a “pour over will” because it pours all of your assets into your trust at your death. Additionally, in a number of states, the will is the primary place where you can name guardians for your minor children.

What if I have named beneficiaries? If you have named beneficiaries on assets (life insurance or retirement accounts for example), the beneficiary designation controls. This is why it is important to make sure your beneficiary designations are in line with your estate plan.

Which one should I do? In most cases, if you are trying to space out distributions for your beneficiary (such as minor children), avoid probate, and want to exercise more control, you should consider a trust-based estate plan. If all of your assets are passing by beneficiary designation and there is no reason to hold things back from your adult beneficiaries, a will-based estate plan could be sufficient.



TRUST QUESTIONNAIRE COUPLE

This document is designed to address the major decisions and details you will be making to prepare your estate plan. The information in this document will be submitted in our planning software, which will review and prepare your estate plan based on the specific information you have provided.

STEP 1 – MARITAL STATUS

_____ Single _____ Married _____ Domestic Partnership

STEP 2 – FAMILY INFORMATION

Trust Name: _____ (usually “Last Name” Family Trust)

Client Name 1 (Please enter this EXACTLY how you want it on the documents.):

FIRST _____ MIDDLE _____ LAST _____

Are you a U.S. Citizen? _____ Yes _____ No

Contact Email Address: _____

Client Name 2 (Please enter this EXACTLY how you want it on the documents.):

FIRST _____ MIDDLE _____ LAST _____

Are you a U.S. Citizen? _____ Yes _____ No

Home Address: _____

City: _____ State: _____ Zip Code: _____ County: _____

This is the address that you consider your primary residence. If you have multiple residences, please use the address that you used for your latest income tax return.

Do you own this home? _____ Yes _____ No

If you have a mortgage, you STILL own the home – so please mark Yes.

If yes, who holds current legal ownership to property? _____ Both _____ Client 1 _____ Client 2

Do you want our service to coordinate the preparation of a deed to transfer your home into the trust (subject to an additional fee in eligible states)?

_____ Yes _____ No

Do you own any other real estate? _____ Yes _____ No

This is something other than your home listed above. If you have real estate holdings that are held in an entity (LLC, Partnership, etc.), the real estate itself will not be in the trust. However, you may want to consider making sure the entity interest you own is in your trust.

If yes, what are the addresses? Please include County.



Do you own any business interests? ____ Yes ____ No

This includes any entity.

If yes, do you want our service to prepare a business assignment that transfers this business interest into your trust (subject to an additional fee)?

____ Yes ____ No

The benefit of this is making it clear that you want the entity to be owned by your trust.

If yes:

(1) What is the EXACT name of the business?

(2) Who owns the business interest? ____ Both ____ Client 1 ____ Client 2

Have you previously done a trust? ____ Yes ____ No

This is a trust that is currently in existence. If you were previously married and divorced and had a trust then, this would NOT count. This is for individuals and couples that are redoing their existing trust. It is important to keep the same trust name and date so you do not have to re-title assets that are already in that existing trust.

If yes:

(1) What is the EXACT name and date of execution of the existing trust?

(2) Are all of your real estate holdings in the existing trust? ____ Yes ____ No

Only mark YES if you are sure (this could be seen on your deed or potentially on your property tax statement).

(3) Do you want our service to prepare a summary of your existing trust (subject to an additional fee)?

____ Yes ____ No



Information about Living Children:

The term “children” includes those that are biological or adopted. It does NOT include stepchildren or foster children. For stepchildren, you can still treat them as if they are your children. It is important to differentiate here to minimize potential issues after your death.

For each child, please list the child exactly how you want them listed in the documents. If you want to use a middle name or initial, use the first name box (for example, John Q or John Quentin in the first name box). If you have a child that may change her last name upon marriage, you do NOT need to make changes later to reflect this.

Do you have any living children? _____ Yes _____ No

Child 1 Name: _____ DOB: _____ Gender: _____ Male _____ Female

Address (if different than yours): _____

Optional Contact Info: Email: _____ Phone Number: _____

Is the biological or adopted child of: _____ Both _____ Client 1 _____ Client 2

Is the child disinherited? _____ Yes _____ No

Child 2 Name: _____ DOB: _____ Gender: _____ Male _____ Female

Address (if different than yours): _____

Optional Contact Info: Email: _____ Phone Number: _____

Is the biological or adopted child of: _____ Both _____ Client 1 _____ Client 2

Is the child disinherited? _____ Yes _____ No

Child 3 Name: _____ DOB: _____ Gender: _____ Male _____ Female

Address (if different than yours): _____

Optional Contact Info: Email: _____ Phone Number: _____

Is the biological or adopted child of: _____ Both _____ Client 1 _____ Client 2

Is the child disinherited? _____ Yes _____ No



Child 4 Name: _____ DOB: _____ Gender: ____Male__Female

Address (if different than yours): _____

Optional Contact Info: Email: _____ Phone Number: _____

Is the biological or adopted child of: ____Both ____Client 1 ____Client 2

Is the child disinherited? ____Yes ____No

***Please add additional children on a separate sheet

Information about Deceased Children:

This question may not seem relevant, but we are trying to get your entire family picture. It becomes increasingly important if you have a deceased child who has children (your grandchildren). We want to ensure that they are mentioned and they are potentially provided for in your estate plan.

Do you have any deceased children? ____Yes ____No

If yes, please provide the following information:

Child's Name _____

Is the biological or adopted child of: ____Both ____Client 1 ____Client 2

Name of the Deceased Child's Children, if any: _____

Limitations on Surviving Spouse:

Would you like to limit the surviving spouse's ability to change the estate plan after the first spouse dies?

____Yes ____No

***Please note the answer is most commonly no.

If marked yes, your trust will split into two trusts at the first death (The Surviving Spouse's side and the Deceased Spouse's side). The Surviving Spouse would be able to live off both sides, but could NOT change the beneficiaries of the Deceased Spouse's side.

The most common example of when it may be appropriate to limit the surviving spouse's ability to change the estate plan:

A blended family where you would not want the surviving spouse to be able to change the beneficiaries of the assets. However, this can be mitigated by leaving a gift at one spouse's death directly to those kids or naming those kids as beneficiaries of a life insurance policy or retirement account. You will have the opportunity to determine how you want to provide for all of your beneficiaries in the next step.



STEP 3 – BENEFICIARIES – Who is getting everything and how are they getting it?

On this step, you will determine who gets the remainder of your trust estate first. Then, you will also have the opportunity to dictate what gifts, if any, come off the top (for example, \$10,000 to charity). You can also leave certain items of personal property in those specific gifts (jewelry, etc.). However, do NOT go too far with personal property items – when you sign your estate plan, you have the option to list out personal property items. Putting too many personal property items in the estate plan itself may lead to more amendments to the estate plan in the future.

For each beneficiary, you will state what percentage of the trust estate you are providing to them. Additionally, you will include what would happen if that beneficiary passes away before you, and HOW those beneficiaries will get control of those assets (immediately, with age-based restrictions, or even never)

If you would like to leave a part of your trust estate to a class of people (all living grandchildren for example), you can simply use other, and then write in “all living grandchildren”. If you have more grandchildren, they would already be covered in this scenario and you would not have to amend the trust at a later date if more came into this world.

Are the Beneficiaries getting equal shares? _____ Yes _____ No

Beneficiary Information

Beneficiary 1 Name: _____ Relationship: _____ Percentage or Fraction Interest: _____

Beneficiary 2 Name: _____ Relationship: _____ Percentage or Fraction Interest: _____

Beneficiary 3 Name: _____ Relationship: _____ Percentage or Fraction Interest: _____

Beneficiary 4 Name: _____ Relationship: _____ Percentage or Fraction Interest: _____

Beneficiary 5 Name: _____ Relationship: _____ Percentage or Fraction Interest: _____

For each Beneficiary, you will need to decide the following – please note the answer does not need to be the same for each; please use a separate attachment if your answers vary per beneficiary:

If the beneficiary dies, would you want this share to go to:

_____ Per Stirpes (generally that beneficiary’s child(ren))

_____ Lapse (to the other named beneficiaries)

_____ Other: _____



- *Per Stirpes* – This definition follows the beneficiary’s family tree, giving equal weight to each branch of that family tree. For example, if your beneficiary that has deceased has four living children, this share would be divided into four equal shares (25% each). Taking this example further, if one of the four children was deceased and that child had two children, there would be three shares of 25% for the living children of the deceased beneficiary, and the final 25% would be split into two equal shares (12.5% each) for the grandchildren of the deceased beneficiary. Per stirpes does NOT include a daughter in law or son in law.
- *Lapse* – This definition states that if the beneficiary is deceased, that share goes back into the pot and is re-allocated among the other beneficiaries getting a percentage. For example, if you have three beneficiaries getting 50%, 25% and 25%, and one of the 25% beneficiaries dies before the client with a “lapse” provision, that 25% would be re-allocated pro-rata to the other two living beneficiaries. In this example, the 50% beneficiary would move up to 2/3 (or 66.67%) and the other 25% beneficiary would move up to 1/3 (or 33.33%).
- *Other* – You also have the opportunity to dictate what you would want to have happen to this share if either of the two definitions do not fit your needs. For example, common provisions would be providing it to one of your other beneficiaries (versus all of them in a lapse scenario) or naming a charity to get that share. Depending on how complicated these provisions are, your plan may require enhanced review by one of our qualified estate planning professionals.

Restrictions: Do you want restrictions on the distributions to any specified beneficiary? __Yes__ No

If you choose no, you are stating that you would be okay with the beneficiary doing whatever they want with any inheritance they receive from you upon your passing. This is the most common approach for adults who can manage their own finances reasonably well.

If you choose yes, there are several available pre-populated restrictions to choose from. If none of these fit what you are looking for, you can also select “other” and write in what you would like.

If you choose yes for any restriction, the default is that the trustee (person in charge of the finances) will be able to make payments for that beneficiary’s health care, education, and support (all defined terms in the documents) before the beneficiary reaches your determined ages. The assets are NOT frozen! Your trustee can use if for your beneficiary’s college needs (including tutors, living expenses), health care, down payment on a home (classified as support). Resist the temptation to be too specific here – you put a trustee in place for a reason. You do not want to unintentionally limit your trustee’s ability to adjust to circumstances after you are gone.

Short Definitions of the Pre - Populated Options include:



- *Special Needs Trust – A Special Needs Trust is utilized for beneficiaries with needs - based public benefits (their eligibility is conditioned upon having very few assets). A special needs trust would be there to supplement this beneficiary's current benefits (NOT supplant them). If you are unsure if a beneficiary requires a special needs trust, the trust language authorizes the trustee to convert any share to a special needs trust if it is appropriate to do so after your death and you did NOT select this option.*
- *Age - Based Restrictions – It is common for clients with younger children to choose one of the below options. Each beneficiary will have the opportunity to have payments made for their health care, education, and support (in the trustee's discretion). However, these ages refer to when the beneficiary receives his / her inheritance.*
- *Never in Control – This is used in extreme circumstances where you absolutely do not want a beneficiary to ever control their funds at any age. Use this with caution as a trustee will be needed for that beneficiary's entire life.*

If yes, do you want the following:

_____ Special Needs Trust (used for beneficiaries with special health needs who may have needs- based public benefits)

_____ Age Based Restrictions (beneficiaries would still have access to funds for health care, education, and support. If yes, choose the restriction:

_____ 1/3 at 25, 1/3 at 30, and 1/3 at 35

_____ 1/3 at earlier of undergrad degree or 25, 1/3 at 30, and 1/3 at 35

_____ 1/2 at 25, 1/2 at 30

_____ Never in Control

_____ Other: Please describe:

Specific Gifts (for charity, pets, or others in your life) – for each, please denote if it is after a particular spouse's death or after both have died, and the amount or item:

In some cases, if one spouse dies first, they will want to leave a gift to particular people (that client's children in a blended family). If you intend to leave a gift at the first death, consider your options. These options include:



- *Specific item, asset, or flat dollar figure – This is easiest to administer for your trustee. Be careful not to leave too high of a dollar figure where you may hamstring the surviving spouse's ability to live if you are gone (if applicable).*
- *Percentage amount of your estate – Proceed with caution here – if you are leaving even 1%, that beneficiary is generally entitled to information about ALL of the assets to make sure they are getting their 1%.*
- *Hybrid Approach – A dollar amount, but make it NOT TO EXCEED a certain percentage of the trust estate. For example, \$100,000, but not to exceed 10% of the trust estate. This often gives you the certainty of the dollar figure, but also making sure if your net worth drops considerably, allows the trustee to limit the amount of the gift to the percentage figure.*

STEP 4 – TRUSTEES, EXECUTORS, POWERS OF ATTORNEY

After one of you is unable to act (death or incapacity), would you want your spouse/partner to make financial decisions as the Primary Agent?

_____ Yes _____ No

If you are married, the most common answer is yes. With a married couple, it is assumed the spouse is first as you will both be the trustees of your trust (the person in charge of the finances). Generally, if one of you cannot be the trustee (death or incapacity), the other one will remain the sole trustee.

Who do you want to make financial decisions for you if you cannot make them for yourself (after your spouse or partner)? Please list relationship also.

#1: _____ #2: _____

#3: _____

A Successor Trustee/Executor/Power of Attorney is the person who would control your finances if you cannot due to your death, mental incapacity, or voluntary resignation. You generally have the same people here to maintain consistency. The successor trustee works on the trust assets. The executor is in charge of the non-trust assets after your death (covered in your pour-over will) and the power of attorney is charge of non-trust assets during your life.

The type of person who makes a good trustee is someone who is financially responsible, would handle finances similar to you, and is generally a good decision maker. If you do not have a family member or friend that fits the bill, there are professional trustees who could potentially be the right fit.



Do you want these powers limited in any way? ____ Yes ____ No

The most common answer here is no. If you want someone to act for you, let them act!

- *There are rare occasions when we do see the answer as yes. For example, if you own a business and you have specifically designated somebody else to be in control of the business. On a power of attorney, you may doing the power of attorney for a limited purpose, such as executing documents on a real estate transaction while you are out of the country. If this is the case, leave a note.*

Timing on power of attorney (most common is immediate for primary agent (spouse) and springing for all others):

____ Immediate for Primary Agent only (most common for married couples or domestic partnerships)

____ Immediate for all agents

____ Springing

All powers of attorney produced by this service are durable, meaning they are still in effect following the incapacity of a person.

Giving a person immediate power of attorney is usually reserved for a spouse. With that said, the State of Florida requires all powers of attorney to be immediate. Additionally, if you have complete confidence in your named agents, there is an argument to make each agent's power effective immediately.

A springing power of attorney "springs" into effect upon the capacity of the agent. This means the agents are required to obtain letters of incapacity from a doctor prior to taking action under the power of attorney. We often refer to this as the "I love you, I trust you. But get a doctor's letter before you start making my financial decisions" clause.

Do any of these agents act together at the same time? ____ Yes ____ No

Proceed with caution when naming multiple trustees to act at the same time. It can be a logistical nightmare if multiple trustees are required to sign everything. The beneficiaries will have oversight on the successor trustee in the form of accountings.

STEP 5 – HEALTH CARE AGENTS

Who do you want to make health care decisions for you if you cannot make them for yourself? If you are married, we generally see the spouse first. Please list the relationship also.

Client #1

#1: _____

#2: _____

#3: _____



The type of person that you name here can make difficult, emotional decisions at the most difficult, emotional time. You want someone who will take into account what you want (which may not agree with what they want for you). For example, a lot of clients will not name a parent, who they feel will be too emotional and not able to let their child go.

Do any of these agents act together at the same time? _____ Yes _____ No

Proceed with caution when naming multiple health care agents to act at the same time. It can be a logistical nightmare if multiple agents are required to agree on everything.

Client #2

#1: _____ #2: _____

#3: _____

The type of person that you name here can make difficult, emotional decisions at the most difficult, emotional time. You want someone who will take into account what you want (which may not agree with what they want for you). For example, a lot of clients will not name a parent, who they feel will be too emotional and not able to let their child go.

Do any of these agents act together at the same time? _____ Yes _____ No

Proceed with caution when naming multiple health care agents to act at the same time. It can be a logistical nightmare if multiple agents are required to agree on everything.

Would you like to include specific wishes about your health care desires? _____ Yes _____ No

***If Yes, please complete the enclosed Statement of Wishes for each client. If No, please proceed to Step 6.

STEP 6 – GUARDIAN

Do you have any children under the age of 18 or expect to in the future? _____ Yes _____ No

If yes, who would have physical custody of any minor children?

#1: _____ #2: _____ #3: _____



This is the person (or people) who will have physical custody of your minor children if you were to die. The guardian will be able to work with the trustee to access funds for your children's needs (health care, education, support, etc.). The guardian is not meant to have a financial toll as a result of taking your children. Consequently, the trustee (who manages your finances) would be able to make upgrades to your guardian's home or vehicle to take into account the fact that they now have your children. If you aren't sure if there will be enough for the guardian, life insurance is often used as a way to bridge this gap.

Common ideas/restrictions:

- *Name one of your parents (or some of them).*
- *Name a child of yours that is over the age of 18.*
- *Name a couple that must be married to each other and living together to qualify as guardian.*
- *State that the guardian must live in your home or within a certain number of miles to qualify as guardian.*

Do any of these agents act together at the same time? ___ Yes ___ No

Proceed with caution when naming multiple guardians to act at the same time. It can be a logistical nightmare if multiple agents are required to agree on everything.

Are there any other restrictions on the named guardians (must be married to each other and living together, live within a certain area, etc.)?



INSTRUCTIONS FOR COMPLETING THE STATEMENT OF WISHES – 2 Copies Enclosed

Typical health care directives, living wills, and powers of attorney for health care that are provided by each state vary significantly from one state to the next. A number of clients are satisfied with naming people they know will make the right choices for them and do not feel the need to outline every situation. On the other hand, many clients seek a more comprehensive solution when it comes to giving specific instructions on these documents and prefer to give more detail on what their wishes would be when they are in a place where they cannot speak for themselves. A Statement of Wishes to be completed by each individual client is made for this purpose.

End of Life Decisions:

This section can evoke some strong feelings. Some thoughts that may assist you:

1. If there is any reasonable hope of full recovery, you will be kept alive. A medical facility can let you die, but they cannot kill you.
2. You should have conversations with your loved ones about your feelings here because it is not feasible to try to address all possible scenarios.

We have three sections in this question:

End of Life Decision: If you select any of the “Not to Prolong Life” options, this is what is often called “pulling the plug”. There are two broad circumstances where this action is considered – (1) When a person is in a state of permanent unconsciousness; and (2) When a person has a terminal condition.

- To Prolong Life – Take all measures to keep your life going under all circumstances.
- Not to Prolong Life – Any Circumstances: If you do NOT want your life prolonged if you are permanently unconscious OR have a terminal condition, select this.
- Not to Prolong Life – Permanently Unconscious: If you do NOT want your life prolonged if you are permanently unconscious, but you would if you have a terminal condition, select this.
- Not to Prolong Life – Terminal Condition: If you do NOT want your life prolonged if you have a terminal condition, but you would if you are permanently unconscious, select this.
- Not to Prolong Life – Other: You may have a different selection here. Please either leave a note or be prepared to address before you sign the documents.

Artificial Nutrition and Hydration: Receiving artificial nutrition and hydration can prolong your life. Depending on your wishes, this could be a good thing or a bad thing. You may select wishes on this topic.

Relief from Pain: You can select to have adequate treatment for pain relief at all times, even if it hastens your death. You can also select other.



Anatomical Gifts at Death:

To Give the Following Gifts (select all that apply):

You can state what parts of your body, if any, you would like to give. We see most people fall into the following camps:

1. "Take whatever you want – I don't need it anymore" or "I doubt they want any of my stuff, but they can have it" – if this sounds like you, select Organs, Tissues, and all other body parts.
2. "I don't want to be a cadaver on some med student's table" – if this sounds like you, you may select just Organs OR you refuse to make an anatomical gift.
3. "I only want to give..." – if this sounds like you, select other and leave a note if you know what you want.
4. "I don't want to be cut up after I'm gone" – if this sounds like you, select that you refuse to make an anatomical gift.

To give those gifts for the following purposes (Select All that apply):

You can state why you would want gifts given. The most common answer is "I don't care what they use them for. I will be gone." If that is the case, click Transplant, Therapy, Research, and Education (OR All of the above). These terms are used in a number of states. Depending on your state, it can have a varying meaning – for example, we have seen "Therapy" defined in 12 different ways by state legislatures.

As far as who can have the anatomical gifts, a number of states do not allow you have a preference. With that said, if you have strong feelings about it, do not hesitate to insert in the attachment.

Other Wishes:

Mental Health Treatments: Some examples of mental health treatments include admission to and retention at a mental health facility, psychotropic medications, and electroconvulsive treatment.

The most common answer is that your health care agent(s) or the attending physician can make this decision on your behalf.

Autopsy: If you would like to state whether or not you want an autopsy (or if you would like your agent to decide), you may indicate here.

Funeral and Burial:

First two Options (Burial/Cremation): If you have a preference on cremation and/or burial, but have NOT made prepaid arrangements.

Third Option (Agent Selection): If you do not have a preference on cremation/burial and are comfortable with your agent deciding.



Fourth Option (Prepaid Arrangements made): If you have made prepaid arrangements, let that be known and include those documents with your estate plan.

Do Not Resuscitate Directive (DNR): If you have a formal Do Not Resuscitate Directive (DNR), please state. The documents you are completing here do NOT constitute a DNR. This is something that must be completed with your physician.

Physical Health Treatments: Some examples of physical health treatments include CPR, mechanical breathing, major surgery, kidney dialysis, chemotherapy, diagnostic tests, antibiotics, blood products, etc.

The most common answer is that your health care agent(s) or the attending physician can make this decision on your behalf.



STATEMENT OF WISHES – ATTACHMENT TO HEALTH CARE DIRECTIVE

This document is designed to provide your loved ones with a statement of certain health care wishes. Ideally, this provides guidance on what you would want to have happen under certain circumstances. This is designed to be attached to any relevant health care document, including, but not limited to, a health care power of attorney, advance health care directive, living will, or health care proxy.

End of Life Wishes

_____ To Prolong Life

_____ Not to Prolong Life – Any Circumstances (Permanently Unconscious OR Terminal Condition)

_____ Not to Prolong Life – Permanently Unconscious

_____ Not to Prolong Life – Terminal Condition

Other: _____

Artificial Nutrition and Hydration

_____ To receive artificial nutrition and hydration indefinitely

_____ To receive artificial nutrition and hydration indefinitely, unless it clearly increases my suffering and is no longer in my best interest.

_____ To receive artificial nutrition and hydration on a limited trial basis to see if I can improve.

_____ I do NOT wish to receive artificial nutrition and hydration

Other: _____

Relief from Pain

_____ To have pain relief at all times to alleviate pain and discomfort.

Other: _____

Anatomical Gift at Death

_____ Organs _____ Tissues _____ All body parts _____ NO Anatomical Gifts

Other: _____

_____ Transplant _____ Therapy _____ Research _____ Education _____ All

Other: _____

Provide anatomical gifts to: _____ No Preference _____ Other: _____



Other Wishes

Mental Health Treatments: I want to have the following mental health treatments:

_____ Okay with whatever needs to be done

_____ Do NOT want any Mental Health Treatments

_____ My Health Care Agent or attending physician may decide

_____ Other: _____

Autopsy: _____ Yes _____ No _____ My Agent may decide _____ Other: _____

Funeral/Burial: _____ Buried _____ Cremated _____ My Agent may decide

_____ I have already made funeral arrangements and will include those instructions with my plan.

Do Not Resuscitate (DNR) Directive (do you have one): _____ Yes _____ No

Physical Treatments: I want to have the following physical treatments:

_____ Okay with whatever needs to be done

_____ Do NOT want any Physical Health Treatments

_____ My Health Care Agent or attending physician may decide

_____ Other: _____

DATE: _____

SIGNATURE: _____

CLIENT NAME: _____



STATEMENT OF WISHES – ATTACHMENT TO HEALTH CARE DIRECTIVE

This document is designed to provide your loved ones with a statement of certain health care wishes. Ideally, this provides guidance on what you would want to have happen under certain circumstances. This is designed to be attached to any relevant health care document, including, but not limited to, a health care power of attorney, advance health care directive, living will, or health care proxy.

End of Life Wishes

_____ To Prolong Life

_____ Not to Prolong Life – Any Circumstances (Permanently Unconscious OR Terminal Condition)

_____ Not to Prolong Life – Permanently Unconscious

_____ Not to Prolong Life – Terminal Condition

Other: _____

Artificial Nutrition and Hydration

_____ To receive artificial nutrition and hydration indefinitely

_____ To receive artificial nutrition and hydration indefinitely, unless it clearly increases my suffering and is no longer in my best interest.

_____ To receive artificial nutrition and hydration on a limited trial basis to see if I can improve.

_____ I do NOT wish to receive artificial nutrition and hydration

Other: _____

Relief from Pain

_____ To have pain relief at all times to alleviate pain and discomfort.

Other: _____

Anatomical Gift at Death

_____ Organs _____ Tissues _____ All body parts _____ NO Anatomical Gifts

Other: _____

_____ Transplant _____ Therapy _____ Research _____ Education _____ All

Other: _____

Provide anatomical gifts to: _____ No Preference _____ Other: _____



Other Wishes

Mental Health Treatments: I want to have the following mental health treatments:

_____ Okay with whatever needs to be done

_____ Do NOT want any Mental Health Treatments

_____ My Health Care Agent or attending physician may decide

_____ Other: _____

Autopsy: _____ Yes _____ No _____ My Agent may decide _____ Other: _____

Funeral/Burial: _____ Buried _____ Cremated _____ My Agent may decide

_____ I have already made funeral arrangements and will include those instructions with my plan.

Do Not Resuscitate (DNR) Directive (do you have one): _____ Yes _____ No

Physical Treatments: I want to have the following physical treatments:

_____ Okay with whatever needs to be done

_____ Do NOT want any Physical Health Treatments

_____ My Health Care Agent or attending physician may decide

_____ Other: _____

DATE: _____

SIGNATURE: _____

CLIENT NAME: _____