

SMITH AND MILLER ATTORNEYS
CHECKLIST
ESTATE PLANNING

We believe that there is no such thing as simply writing a will without some basic estate planning regardless of the size of your estate. Property can be titled in joint survivorship which can avoid probate and reduce legal fees, particularly with surviving spouses.

For your appointment, bring the following documents:

Wills

- The existing last will and testament, if any.
- copies of all deeds to real estate
- If you have minor children, the name of someone to serve as guardian until they turn 18 years old
- If you have minor children, the name of someone to serve as their trustee of assets until they turn 18 years old
- a list of specific requests, if you want it. (keep it short!)
- Name of the person you want to serve as executor to handle the estate, and provide a backup person.

Durable Power of Attorney

- name and address of person authorized to sign legal documents on your behalf, deeds, checks, deposits, etc. Make sure to provide a backup as well.

Health Care Power of Attorney

- name and address of person authorized to make medical decisions on your behalf when you are unable to do so. Make sure to provide a backup as well.

Living Will

- names, addresses and phone numbers of two persons you want notified in the event that you are permanently unconscious and unable to benefit from both artificial hydration and artificial nutrition.