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# Estate Planning Appointment Guide

### Here's what to expect during your estate planning appointment:

- We'll begin with a short questionnaire that will allow an attorney to recommend either a will or a revocable trust.
- After, we'll help you obtain two important documents: a Financial Power of Attorney and a Healthcare Power of Attorney
- We'll then work together to complete your estate plan within the Estate Guru platform.

Before your appointment, please prepare answers to the following:

**Attorney-in-Fact/Agent for Healthcare Power of Attorney.** Who would you choose to make healthcare decisions on your behalf in the event you cannot personally make your wishes known? You can name as many as 4, but we recommend naming at least 2.

_____ _____

First Choice/Full Legal Name Second Choice/Full Legal Name

**Attorney-in-Fact/Agent for Financial Power of Attorney.** In the event you're unable to do so, who would you choose to pay your bills, write checks, and manage your assets not held in trust? This is often the same individual who you name as your executor or successor trustee. Your trustee manages the assets in the trust and your attorney-in-fact/agent for financial power of attorney manages the assets outside the trust. You can name as many as 4, but we recommend at least 2.

_____ _____

First Choice/Full Legal Name Second Choice/Full Legal Name

**Personal Representative.** In the event of your death or incapacitation, your executor, also known as a successor trustee, will oversee your affairs by distributing your property and assets. It is wise to name at least two individuals in the event that one is unable to serve. You can name as many as four, although we recommend that you name at least two.

_____ _____

First Choice/Full Legal Name Second Choice/Full Legal Name

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**Guardian for Minor Children.** In the event of your death or incapacitation, who will be legally responsible for the care and control of your minor children? It is wise to name at least two individuals in the event one is unable to serve. You can name as many as four, although we recommend naming at least two.

First Choice/Full Legal Name

Second Choice/Full Legal Name

**Dates of Birth.** Please have your children's birthdate information on hand.

**General Thoughts on Asset Distribution.** The individuals or institutions who receive your assets upon your death are referred to as beneficiaries. As you make plans for asset distribution, be sure to consider the following:

- Who will receive your assets after your death? Will your assets be divided equally among your living children (this is the most common choice) or will there be a different arrangement? If one beneficiary was to predecease you, who is the alternate beneficiary?

NOTES:

- Is there anyone that you wish to formally disinherit (former spouses are automatically disinherited)?

NOTES:

- If your beneficiaries are minors, you can hold their inheritance in trust so they do not receive their entire inheritance at age 18. You can also distribute their inheritance over as many as three different ages. For example: they'll receive 20% of their inheritance at age 18; 50% at age 25; and the remaining balance at age 30.

NOTES:

- In addition to age-based distributions, which, if any, of the following conditions do you want to impose on your beneficiaries as a requirement to receive assets? Three options are provided: drug-free, alcohol-free, and/or gambling-free.

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NOTES:

- Prior to distributing your assets, you can make specific bequests. Specific assets, including digital assets or real estate, can be distributed to specific people and charities.

  Examples:
  Give the grandfather clock to Sara.
  Give the cabin in Cedar City, UT, to Jason.
  Give $10,000 to the American Heart Association.

NOTES:

*It is not necessary, nor recommended, that you attempt to provide details for who should receive every item. The distribution of smaller, less valuable items is handled in a separate, stand-alone "Letter of Direction" that is referenced in the trust/will.

- If you have any pets, thoughtfully consider a caretaker to entrust your pets to. In selecting a caretaker, would you like to provide them with a monetary amount for the care of your pets?

NOTES:

- Is In the unlikely event that everyone named as a beneficiary predeceases you, who will receive your assets? This person is known as your ultimate beneficiary. By default, your ultimate beneficiary is your last living relative, but you can name specific individuals or institutions instead, such as a family friend, a favorite charity, or your church.

NOTES:

**Net Worth.** Please have your approximate net worth on hand.

**Deeds.** If applicable, please provide copies of any deeds to property you own.

**Existing Trust.** If applicable, please provide a copy of your existing trust.