

The Laundry List

Don't Heir Them in Probate Court.



Core Documents

- Revocable Living Trust (funded – deed recorded, assets transferred)
- Pour-Over Will
- Durable Power of Attorney (financial)
- Advance Health Care Directive
- HIPAA Authorization

Funding & Beneficiaries

- House deed recorded in trust name
- Beneficiary forms updated (retirement, life insurance)

- Bank and investment accounts titled in trust name
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Fiduciaries (Ask each person first)

- Successor Trustee
 - Executor
 - Agent under DPOA
 - Agent under Health Care Directive
 - Guardian for minor children
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The Conversation

- Family knows where documents are kept
 - Family knows who is in charge
 - Family knows your wishes
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Sandwich Generation Extras

- Parents' Durable Power of Attorney
 - Parents' Health Care Directive
 - Long-term care plan
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Review Every 2-3 Years

- Marriage, divorce, new child, death in family
- Move to another state
- Significant change in assets or health

Download. Share with your family. Then call me.

Dirty Laundry - *Because family matters.*

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