

Things to think about for Estate Planning Documents...

- **Your information**
 - a. Names and birthdates
 - b. Addresses
 - c. Phone numbers

- **Advanced Health Directive**
 - a. Agent
 - i. Address
 - ii. Phone Number
 - iii. Email Address
 - b. Contingent Agent
 - i. Address
 - ii. Phone Number
 - iii. Email Address

- **Durable Power of Attorney**
 - a. Agent and Contingent Agent
 - b. Hot Powers – must be specifically granted
 - i. Create, Amend, Revoke, or Terminate an Inter Vivos Trust
 - ii. Make a Gift
 - iii. Create or Change Rights of Survivorship
 - iv. Create or Change a Beneficiary Designation
 - v. Delegate Authority Granted under the Power of Attorney
 - vi. Waive the Principal's Right to be a Beneficiary of a Joint and Survivor Annuity, including Retirement Plans
 - vii. Exercise Fiduciary Powers the Principal has the Authority to Delegate
 - viii. Disclaim Property, including a power of appointment

- **Will**
 - a. Executor and Contingent Executor
 - b. Trustee and Contingent Trustee*
 - c. Guardian and Trustee Guardian*
 - d. Tangible Personal Property ("TPP")
 - i. Think of this as your "things" – like that is in your house, your personal property, vehicles, jewelry, etc.
 - e. Residue
 - i. Think of this as the money – checking/savings accounts and any money retained after TPP is sold
 - ii. This is usually divided by percentages

- **Designation of Standby Guardian**
 - a. Grants temporary guardianship to someone in very narrow circumstances – death, incapacity, incarceration, consent.
 - b. Agent
 - i. Address
 - ii. Phone number
 - c. Contingent Agent
 - i. Address
 - ii. Phone Number