

ESTATE PLANNING DOCUMENTS

Planning for your loved ones and yourself is not just a fill in a blank document that ends all of your worries and lives on all by itself. The planning process and actual portfolio of documents is a little more involved and it should be as you are preparing for you and your loved ones. The following list is presented to give you an idea of just how many issues and documents are involved in this process of love and management.

GENERAL:

Trust

Will

Letter of Intent

Grantor / family insights and expression of priorities for plan

Letter of Instruction for Trustee(s)

Identify administration priorities for care, legal and financial issues

Trustee Advisory Committee Meeting Agenda (a sample)

Review priorities – care, legal, financial – performance and planning

Report on status and determine if changes are needed

Living arrangements, daily activities, condition, treatment, staff

Accounting, investments, disbursements

Identify important or urgent issues

Establish budget based on current needs

Record keeping and accounting binder/folder for retention of documents and accountings

Power of attorney for Financial Transactions

Power of Attorney for Health Care - Patient Advocate Designation

Supplemental Documents for Trusts

Affidavit / Certificate of Trust and Authority

Asset transfer (trust funding) document(s)