



Texas Estate Planning

Strategic Checklist



Bobby Dale Barina

Founder & Chief Legal Strategist
Temple, Texas

Why Your Legacy Needs a Plan

In Texas, if you do not have a plan, the state has one for you. Probate can be a long, expensive, and public process that adds stress to your family during their hardest moments. Estate planning is not just about documents; it is about peace of mind. It ensures your assets go to the right people and your wishes are honored.

Key Benefits of Professional Planning:

- Minimize Texas Probate taxes and fees
- Keep family matters private
- Prevent disputes among heirs
- Protect minor children

Step 1: Inventory Your World

Identify the assets that make up your estate to ensure nothing is overlooked.

Real Estate: Primary residence, land, or rental properties.

Liquid Assets: Bank accounts, savings, and CDs.

Investments: Brokerage accounts, stocks, and bonds.

Retirement: 401k, IRA, or Roth IRA accounts.

Protection: Life insurance policies and annuities.

Business: Ownership stakes in LLCs or Partnerships.

Step 2: Define Your Beneficiaries

Consider not just 'who' but 'how.' Should they receive assets outright or in a trust?

Spouse

Children & Step-children

Grandchildren

Charitable Organizations

Step 3: Appoint Your Advocates

Executor

Carries out the terms of your Will.

Trustee

Manages trust assets for your heirs.

Financial POA

Handles finances if you cannot.

Medical Proxy

Makes medical decisions on your behalf.

Step 4: Protect Your Children

Critical Decision: Guardian Selection

If you do not name a guardian, a judge will decide who raises your children. This is the single most important document for parents.

Trust Planning for Minors

Ensure assets are managed until your children reach a certain age (e.g., 25 or 30) rather than receiving everything at 18.

Your Legacy Starts Here

Do not leave your family's future to chance. Let's build a plan that protects your life's work and those you love most.



Bobby Dale Barina

Barina Law Group | Temple, Texas

Phone: (254) 699-3755

www.bobbybarinalaw.com