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WILL PACKAGE

A “Will Package” includes the preparation of the following documents:

1. Last Will and Testament;
2. Statutory Durable General Power of Attorney (i.e. a “financial power of attorney”);
3. Medical Power of Attorney;
4. Directive to Physicians and Family or Surrogates;
5. Authorization to Release Medical Information (i.e. “HIPAA authorization form”);
6. Declaration of Guardian in the Event of Later Incapacity or Need of Guardian.

If you choose to do Will planning, then it may be necessary for your heirs to probate your Will upon your death. Additionally, your Will only controls the distribution of “probate assets”, which are assets such as real estate, vehicles, boats, personal effects, individual bank accounts (without a beneficiary designation), etc. It is important to note that your Will does not control the distribution of your “non-probate assets”, which are typically assets that have beneficiary designations (i.e. life insurance, 401k plans, IRAs, annuities, bank accounts that are “joint tenants with rights of survivorship” or accounts that are payable on death or transfer on death).

Once your Will and other estate planning documents are signed, we will assist you with **“non-probate asset planning”**, in order to coordinate the beneficiary designations on your non-probate assets with your estate plan. Not only is it critical to have a good estate plan, but it is also important to understand which assets your plan does not control.