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Getting Started with Estate Planning

The goal of estate planning is to help you plan for the orderly accumulation of your assets during your life, and transfer the assets per your wishes at your death. As part of estate planning, each client also receives a durable power of attorney, health care proxy and a DNR which are important documents to have, regardless of your age.

As part of this process, I will gather information from you and inform you about how the status and title of your assets will affect your plan. We will review the options available to you to carry out your wishes, both for end of life concerns, and passing assets at your death. We will draft legal documents to carry out your plans.

Some Ground Rules

1. **Attorney Client Privilege:** Once you have consulted me to represent you on these matters, our relationship is a confidential one. The things we share remain confidential as part of the “attorney client” relationship. These confidences are kept even if I am not hired to work for you.
2. **Accurate Information:** The documents I draft and the decisions made for your plan depend on the accuracy of information you provide.
 - a. **You must provide me with your accurate legal name and any other names you go by.**
 - b. **You must share the general nature and extent of your assets.** Sometimes clients only get comfortable sharing information as we are well into the drafting of documents. It’s important for me to know what you own to formulate the best way to plan for your estate and asset transfer.
3. **Other Documents Affect Your Assets:** Your will is not the only document which affects assets you transfer at death. For example, the following documents also pass assets:

Deeds to property you own.

Beneficiary designation forms for IRAs and retirement accounts.

Beneficiary designation forms for life insurance benefits.

Trust documents or wills of others.

4. **Please Feel Free to Ask Questions!** The legal aspects of estate planning can be difficult to understand and overwhelming. Part of the planning process is the transfer of legal know-how to you, so that you can make informed decisions. So don't be shy about asking questions. It's important you understand how your plan works and to make sure it accomplishes your goals.

Basic Estate Planning Documents

For each estate planning client, we draft the following documents:

- **Last Will and Testament:** Gives assets to your beneficiaries, appoints an executor to handle your estate, appoints a guardian for minor children and provides instructions for tax allocation, estate administration and related matters.
- **Durable Power of Attorney:** Appoints another to act on business and financial matters for you.
- **Health Care Proxy:** Appoints another to make health care decisions if you cannot.
- **Living Will:** Also known as a DNR, this document provides instructions to medical personnel for your end of life care wishes.

Depending on your situation, we can also create a trust for you. A trust is a separate legal entity which owns a source of funds for a particular purpose. For example, a trust may be created to protect assets, simplify the passing of assets at death, provide for minor children, pets and/or special needs relatives. Trustees are fiduciaries who are appointed to manage trust funds for beneficiaries. Trusts can be created while you are alive or be written into a will to "come alive" when you pass away.

Other Estate Planning Matters

In addition to preparing a basic set of documents, we will discuss how your assets are titled, the beneficiary designation forms in place and other aspects that affect the transfer of assets at death. Our goal is to make sure your plan is implemented in the way you want.

We will also discuss whether it makes sense to establish a trust, and plan for taxes and cash needs in your estate for your family or for taxes. If you want to discuss asset protection in the event you may need to qualify for Medicaid, that would be a separate discussion not included in basic estate planning.

Client Estate Planning Intake Form

The information requested below is to enable us to formulate a plan for you, and draft the documents needed to implement it. If you are married, please indicate the information for each spouse.

PLEASE PRINT!

DATE:

Full Legal Name (on driver's license or passport) _____

Any "also known as" names: _____

ADDRESS (Primary residence) _____

Cell Phone: _____

Email : _____

Birthdate: _____

Birth place: _____

U.S. Citizen/Resident Alien: _____

Predeceased spouse ? _____ **Predeceased children?** _____

Please list the name/addresses of your beneficiaries (e.g. siblings/children or parents)

	Addresses/Phone

Assets: *List what you own (bank accounts, property, IRAs, life insurance, etc.)* If you have named a beneficiary or "paid on death" payment for these items, or the property is jointly owned with another person, please indicate that. List by institution and account numbers not needed. If you are the owner of a home or other real estate or business interests, indicate that here too.

Assets	How Owned/Titled- Any named beneficiary?

REAL ESTATE ASSETS - Address	VALUE

Name an Executor (Name/Address)

Primary:	Alternate:

Health Care Proxy: (Name/Address/Cell)

Primary:	Alternate:

Durable Power of Attorney Name/Address/Cell

Primary:	Alternate:

Trustee of Trust for Children/Guardian (if needed)

Primary:	Alternate

Special Requests under Your Will

Please indicate any special wishes concerning care of pets, burial wishes, gifts of specific property to specific people.

Is there any other information you would like to tell me or think I should know? Please jot that down here.