If I die . . .

• “Most people die at 25 and aren’t buried until they’re 75.”
  Benjamin Franklin

• I'm always relieved when someone is delivering a eulogy and I realise I'm listening to it.
  George Carlin

• It's not that I'm afraid to die, I just don't want to be there when it happens.
  Woody Allen
OVERVIEW

• The talk

• Life Planning
  • Will or Trust
    • Or not
  • Personal – assets, family, death
    • Power of attorney

• End of life choices
  • Advanced Health Care Directive
  • Orders for Life-Sustaining Treatment
  • Do Not Resuscitate
THE TALK
WHO WILL TAKE CARE OF ME?

• POWER OF ATTORNEY
  • GENERAL OR SPECIAL CIRCUMSTANCES
  • ENDS ON INCAPACITY
• DURALE POWER OF ATTORNEY
  • CONTINUES AFTER LOSS OF CAPACITY
• SPRINGING POWER OF ATTORNEY
  • EFFECTIVE ON DATE OR CONDITION
• OTHERS
ESTATE PLANNING

WILLS

TRUSTS
OPTIONS TO WILLS OR TRUSTS

- Joint Tenancy
- Revocable Transfer Upon Death
- For Life Insurance, Retirement Plans, Trustee Bank Accounts, Pay on Death Assets
- Spend It All
OPTIONS FOR YOUR HEIRS

Affidavit for Transfer of Personal Property Worth $150,000 or Less

• All real and personal property.

• All life insurance or retirement benefits that will be paid to the estate (but not any insurance or retirement benefits designated to be paid to some other person).

• Affidavit Contents

• Process
HEALTH CARE DECISIONS

ADVANCE HEALTH CARE DIRECTIVE

DO NOT RECUSITATE

PHYSICIAN ORDERS FOR LIFE-SUSTAINING TREATMENT
CONSERVATORSHIP
HOW TO SET UP A CONSERVATORSHIP
DUTIES OF A CONSERVATOR
THE TALK REDUX
THANKS!