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!