



SCHELL BRAY PLLC
Attorneys and Counselors at Law

ITEMS TO CONSIDER BEFORE YOUR ESTATE PLANNING CONFERENCE

- **Fiduciaries**
 - Who should be in charge of the settlement of your estate (Personal Representative)?
 - Who should act for you in the event you become incapacitated?
 - In financial matters (Attorney-in-fact under Durable Power of Attorney)?
 - In health care matters (Health Care Agent)?
 - If you have minor children, who should raise those children if both parents are deceased (Guardian)? This is a different question from who should manage assets you may leave to benefit the minor child. In many cases, the individual who is best to raise a child will not be the best person to manage the child's inheritance.
 - Do you wish to name backups in case your first choices for these fiduciary roles is unable to serve?

- **Beneficiaries**
 - What individuals and/or charities should benefit from your estate at death and in what proportions or amounts?
 - What if the person or persons named does not survive you? What if none of your immediate family members survive you?

- **Inheritance Received Outright or in Trust**
 - If you wish to benefit individuals at your death, should the assets from your estate pass directly to those individuals or should the assets be held by another person (a "Trustee") who would manage those assets for the benefit of the individual and use assets being managed for that individual's benefit?
 - Is there an age or ages at which any such assets remaining in such a trust should be made available to the beneficiary without the Trustee being in charge?

- **Financial Information**
 - Your attorney will need certain financial information in order to properly advise you with respect to your estate planning.
 - Please see our Estate Planning Questionnaire and complete it as well as you can or bring information in another form that is responsive to the questions asked in the questionnaire.