

The 7-Step Plan to Securing Your Family's Future

- 1.** Choose the person or people you'd like to be your **decision-making agent in the event of an emergency**. Identifying these people as an authority early on helps you avoid the need to go to court to obtain guardianship later.
- 2.** Think about **the kind of medical care you want to receive** in the event that you are unable to make those decisions on your own in the future. Make those wishes known to your decision-making agent.
- 3.** Put in place the documents you need while you're alive that allow your decision-maker to quickly and easily act on your behalf. Anyone who is 18 or older should have the following documents in place:
 - › General power of attorney for personal, legal, and financial matters
 - › HIPAA patient authorization giving access to important medical information
 - › Health care proxy / advance directive appointing a decision-maker for medical care
- 4.** Outline who is to receive your assets after you pass away. You can do this either through a **will** or a **trust**. A will directs who should receive your assets, and names a guardian if you have minor children. A trust also directs who should receive your assets, and does so while avoiding the need for a probate administration, among other benefits.
- 5.** Choose an **executor** or **trustee** who will be in charge of carrying out the administration of your estate.

6.

Do everything you can to make the transition as easy as possible. This may include creating a list of your assets with relevant account or other information, listing important information like names, phone numbers, and passwords, pre-planning your funeral or burial arrangements, and avoiding the need for a costly and time-consuming **probate administration**. Planning to avoid probate may involve retitling assets, reviewing beneficiary designations, and creating a revocable trust.

7.

Contact an **experienced attorney** to clarify and help you through all the steps of the process, including:

- › Advising you on how to avoid probate
- › Deciding whether or not you need a trust
- › Ensuring all your documents are executed properly

A top-notch estate planning attorney should make you feel comfortable in your decisions and reassured that you have a plan in place for your family.

**It is never too soon to start thinking
about protecting your assets and
making a plan for your loved ones.**

**Call Attorney Candice O'Neil
to get started on your plan today:**

[603-434-1770](tel:603-434-1770)