



Pierce County Caregiver Conference 2021: The Book and the Bag

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Solo-practice attorney and practicing law 8 years


Primary practice areas: Estate Planning, Elder Law, Probate

Also practice: Real Estate Contracts, Small Business Formation

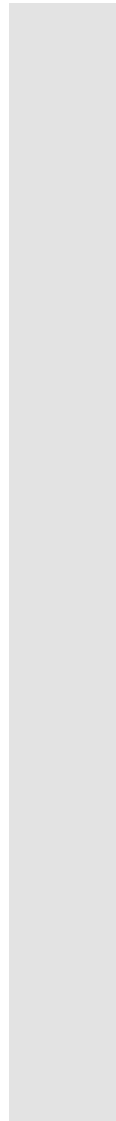
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- Practicing attorney since 2018
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The Book:
Estate
Planning
Documents

- Will
- Revocable Living Trust
- Durable Powers of Attorney
- Health Care Directive

- Allows you to describe how you want your money and property distributed when you pass away
- Does not avoid probate but makes it easier

Wills

Revocable
Living
Trust

- Also allows you to describe how you want money and property distributed when you pass away
- Allows for probate avoidance if it is properly funded

Durable
Powers
of
Attorney

- Document(s) that allow you to appoint someone to make medical and financial decisions for you
- The MOST important estate planning document
- Need a guardianship if you lose capacity and don't have a DPOA
- Ends at death

- End-of-life document
- Allows you to indicate whether you want artificial nutrition or hydration
- Works in tandem with Durable Power of Attorney for Health Care
- Does NOT apply if there is any hope of recovery
- Also known as a Living Will or Directive to Physicians

Health Care Directive

- POLST (Physician Order of Life-Sustaining Treatment): Bright green form that your doctor signs; applies to paramedics
- Community Property Agreement: Allows married couples to avoid probate after first spouse passes
- Disposition of Remains: Tells funeral home what you want done with your body when you pass away

Other Estate Planning Tools