FOR FAMILIES IN HOSPICE CARE

PLAN TODAY TO PROTECT YOUR FAMILY

Work through these steps with your loved one and family. You don't need to finish everything at once. Start with what's missing, and write down where each document is kept.

PART 1 · HAVE THESE IN PLACE NOW

☐ 1. A current will or living trust

Names who receives what and who settles the estate. A funded living trust usually avoids probate court. If signed years ago, check that it still names the right people and matches what the family owns.

Date signed: _____ Kept at: _____

☐ 2. Power of attorney for finances

Lets a trusted person pay bills, manage accounts and handle paperwork. It must be signed while your loved one still understands it, so this step can't wait.

Agent named: _____ Kept at: _____

☐ 3. Advance health care directive

Puts medical wishes in writing and names who may speak with doctors. Give copies to the hospice team and to family.

Health care agent: _____ ☐ Copy given to hospice team

PART 2 · REVIEW THESE

☐ 4. Beneficiaries and titles

These assets go to whoever is named on the form or title, not by the will. Check each one:

- ☐ Bank accounts
- ☐ Retirement accounts
- ☐ Life insurance
- ☐ Annuities
- ☐ Home deed
- ☐ Vehicle titles

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PART 3 · AFTER A LOSS

☐ 5. Know which path applies

What happens next depends on how assets were held.

LIVING TRUST

The successor trustee settles the trust privately, without court. Beneficiaries and heirs get notice within 60 days.

NO TRUST

Assets in the person's name alone may need probate court, which commonly takes many months.

SMALL ESTATE

Simpler transfers up to $208,850, or a shorter petition for a primary residence worth $750,000 or less.*

WHERE THINGS ARE KEPT

Document	Where it's kept
Will or living trust	
Power of attorney	
Advance health care directive	
Deed and vehicle titles	
Account and insurance statements	

KEY CONTACTS

Role	Name	Phone
Hospice care team		
Agent or successor trustee		
Financial advisor or accountant		
Attorney	Tyler Law, LLP	(951) 600-2733

QUESTIONS ABOUT ANY STEP?

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*California limits for deaths on or after April 1, 2025; they are adjusted every three years. This checklist is general information, not legal advice, and does not create an attorney-client relationship. Speak with an attorney about your situation.