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## ESTATE PLANNING COURSE OUTLINE

(an at-a-glance summary of what we'll be covering)

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### BEFORE WE DIVE IN

- A FEW THINGS TO KNOW BEFORE WE GET STARTED

### INTRO TO ESTATE PLANNING

- WHAT IS ESTATE PLANNING AND WHY IS IT IMPORTANT?

### EIGHT (OR NINE) ESTATE PLANNING DOCUMENTS EVERY ADULT NEEDS

### HOW THE REST OF THIS COURSE IS ORGANIZED: A BIRD'S EYE VIEW

#### PLANNING FOR DEATH: THE BASICS

- UNDERSTANDING YOUR WILL
- WHAT IS PROBATE AND SHOULD YOU AVOID IT?
- WHAT IS A TRUST AND DO YOU NEED ONE?
- RECAP: WILL VS. TRUST- A COMPARISON
- TESTAMENTARY TRUSTS

#### PLANNING FOR DEATH: SOME SPECIFICS ABOUT TRUSTS

- HOW TO GET PROPERTY INTO A TRUST
- WHAT HAPPENS IF SOMETHING GETS LEFT OUT OF A TRUST?
- UNDERSTANDING YOUR TRUST DOCUMENT
- OTHER DOCUMENTS THAT WORK WITH YOUR TRUST
- CAN A MARRIED COUPLE SHARE A WILL OR TRUST?
- WHAT IS THE TAX ID NUMBER FOR YOUR TRUST?
- HOW SAFE IS YOUR MONEY?... IT'S ALL ABOUT THE TRUSTEE

#### PLANNING FOR DEATH: LET'S DIVE A LITTLE DEEPER

- THINGS PEOPLE THINK ARE COVERED BY THEIR WILL OR TRUST, BUT MAY NOT BE
- OTHER WAYS TO AVOID PROBATE
- TAKING CARE OF PETS
- DISTRIBUTING PROPERTY 'PER STIRPES', 'BY REPRESENTATION' OR 'PER CAPITA'
- PROPERTY THAT'S NOT EASILY DIVIDABLE, OR HAS A LOAN ON IT
- WHAT IS A BOND AND SHOULD YOUR EXECUTOR OR TRUSTEE HAVE ONE?
- PROPERTY IN A MARRIAGE: COMMUNITY PROPERTY, SEPARATE PROPERTY, AND PROPERTY AGREEMENTS

#### PLANNING FOR DEATH: SPECIAL CIRCUMSTANCES

- DISINHERITING SOMEONE
- SUBSEQUENT MARRIAGES AND BLENDED FAMILIES
- PLANNING FOR LOVED ONES WITH SPECIAL NEEDS

#### PLANNING FOR DEATH: UNDERSTANDING ESTATE TAXES

- WHAT ARE ESTATE TAXES AND WILL YOUR ESTATE HAVE TO PAY THEM?
- HOW TO REDUCE OR AVOID ESTATE TAXES
- OTHER TAXES AND HOW THEY RELATE TO YOUR ESTATE PLAN

#### PLANNING FOR DEATH: WHAT HAPPENS TO YOUR BODY AND OTHER THINGS TO KNOW

- THE DISPOSITION OF REMAINS DOCUMENT
- OTHER "NON-LEGAL" THINGS THAT CAN HELP YOUR LOVED ONES

#### PLANNING FOR INCAPACITY: FINANCES

- THE DURABLE POWER OF ATTORNEY DOCUMENT
- THE PROBLEM WITH ADDING AN ADULT CHILD TO YOUR BANK ACCOUNT

#### PLANNING FOR INCAPACITY: HEALTH CARE

- THREE HEALTH DOCUMENTS EVERY ADULT NEEDS: AN INTRODUCTION
- THE HEALTH CARE POWER OF ATTORNEY
- THE HIPAA AUTHORIZATION
- THE LIVING WILL
- CUTTING THROUGH THE CONFUSION: DIFFERENT NAMES, SAME DOCUMENT
- SPECIAL CIRCUMSTANCES-SPECIAL DOCUMENT: THE DEMENTIA DIRECTIVE

#### PLANNING FOR MINOR CHILDREN

- GUARDIANSHIP DESIGNATION FOR MINORS

#### PLANNING FOR DIGITAL ASSETS

- THE DIGITAL DIARY

#### WHAT NEXT?: REVIEWING, SIGNING, STORING, AND UPDATING YOUR DOCUMENTS

- REVIEWING YOUR DOCUMENTS
- HOW TO SIGN YOUR DOCUMENTS
- WHAT TO DO WITH YOUR DOCUMENTS
- HOW TO REVISE YOUR DOCUMENTS AND KEEP THEM CURRENT

#### LET'S TIE IT ALL TOGETHER

- FINAL REVIEW