



DESIGN MEETING CONSIDERATIONS

Thank you for choosing Holliman Estate Planning & Elder Law to serve you in your need to create an estate plan for you and your family. At your next meeting, the Design Meeting, we will begin to design your customized estate plan. Please answer the questions below and bring with you to the next appointment. We understand that you may be unsure about some of these questions, but we will discuss all of these options and answer your questions in the Design Meeting. **Please include requested personal information for ALL NAMES listed on this sheet on the separate *Names & Addresses Form*; this information will be required to complete your documents.**

THE TRUST

- 1) **What would you like to name your trust?** _____
- 2) **Who would you like to manage your trust in the event you are not able (Successor Trustee)? IF you are doing VA or Medicaid planning, the first choice would be your initial trustee.**

	CLIENT	SPOUSE
First Choice	_____	_____
Second Choice	_____	_____
Third Choice	_____	_____

- 3) **Specific Gifts:** Do you want to make gifts to specific charities (church or other institution) or to a specific person (money, real estate, or specific property to a child or other family member)?

- 4) **Plan for distributing remaining assets after any specific gifts:**
- ___ All to Spouse, then equally to children. If a child does not survive, the deceased child's share would be go to their children.
- ___ All to spouse, then equally between surviving children.
- ___ All to spouse, then _____

___ As follows: _____

- 5) **Who are the beneficiaries?** This can be children or other family members & friends?

CLIENT: _____

SPOUSE: _____

- 6) **Do you want to protect your assets after your death if your spouse remarries?**
CLIENT: YES NO SPOUSE: YES NO

- 7) **Do you want to place any restrictions on any of your children's access to the funds?**



8) **Age of Distribution:** You can decide at what age your beneficiaries are mature enough to manage the assets on their own; this includes children and possibly grandchildren. You can also give them gradual control by granting more access at specific age intervals.

9) **Specific Trustees for underage beneficiaries, special needs beneficiaries, or those requiring special consideration:**

First Choice _____
 Second Choice _____
 Third Choice _____

10) **Ultimate Beneficiary:** Who your property will be distributed to if none of your named beneficiaries survives you and your spouse. This can be your heirs or a charity.

OTHER APPOINTMENTS

1) **EXECUTOR:** Person who oversees your estate when your will is probated.

	CLIENT	SPOUSE
First Choice	_____	_____
Second Choice	_____	_____
Third Choice	_____	_____

2) **POWER OF ATTORNEY:** Person who handles your financial affairs should you become incapacitated in some way.

	CLIENT	SPOUSE
First Choice	_____	_____
Second Choice	_____	_____
Third Choice	_____	_____

3) **HEALTHCARE PROXY:** Person who can make your medical decisions for you if you are unable to make them yourself.

	CLIENT	SPOUSE
First Choice	_____	_____
Second Choice	_____	_____

4) **GUARDIAN (for Minor Children):** Person responsible for the day-to-day care of your children if you are not able to care for them.

First Choice _____
 Second Choice _____
 Third Choice _____