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GENERAL ESTATE PLANNING STEPS USING *LIVING (REVOCABLE) TRUST*

STEP ONE: DESIGNING & DRAFTING THE PLAN

- LIVING TRUST
- "POUR-OVER" WILL
- GENERAL DURABLE POWER OF ATTORNEY
- HEALTHCARE POWER OF ATTORNEY
- ADVANCE DIRECTIVE FOR HEALTH CARE
- HIPAA AUTHORIZATION

STEP TWO: SIGNING CONFERENCE & TRUST FUNDING

- EXECUTING THE ESTATE PLANNING DOCUMENTS WITH THE NECESSARY FORMALITIES AT THE SIGNING CONFERENCE
- TRANSFERRING ASSETS INTO THE TRUST & COORDINATING BENEFICIARY DESIGNATIONS WITH THE TRUST

**◆ PERIODIC REVIEW IS THEN RECOMMENDED BECAUSE
ESTATE PLANNING IS A PROCESS ◆**