



Renard Law Office LLC

Atty. Linda R. Renard
6749 Glacier Drive
West Bend, WI 53090
Phone: 262-629-5937
Fax: 262-629-5938
E-mail: linda@renardlaw.com

RENARD LAW OFFICE, LLC THINGS TO DECIDE AND PROVIDE FOR ESTATE PLANNING DOCUMENTS

WILLS and TRUSTS:

1. Who should the Executor (Personal Representative) be? Trustee? Name and Address. Also, name an alternate. (Trustee is necessary if you establish a trust under your Will.)
2. Who gets your property when you die? If more than one person, what percentage or amount to each person?
3. If giving to a minor child, what age would you want them to get the money? Do you want the Trustee to allow distributions at various ages? (Ex: portion at 22, portion at 25, balance at 28). What ages and what amounts/percentages?
4. If you have minor children, who would the Guardian be? Also pick an alternate person. (Stick with family members—not in-laws—in case of divorce.)
5. What if you and your spouse and children die—where should your property go (“Catastrophe Clause”)?
6. If one of your children dies ahead of you, where should his/her share go—to your other children, or to grandchildren?
7. Your full name (and your spouse’s/partner’s) as you sign important documents.
8. Your address.

FINANCIAL POWER OF ATTORNEY (DPOA):

1. Name of your agent to take care of all your financial affairs if you are disabled. Pick an alternate (at least one). Names and Addresses.
2. Do you want your agent to be able to be paid to perform that job? If so, what dollar amount, or what dollar amount per hour?
3. Your security number (SSN).
4. Do you want more than one person to act as agent? If so, should they have to act together on all things or can they each act independently?

MEDICAL POWER OF ATTORNEY (DHCPOA):

1. Same as number 1 above. (Agent and alternate agent(s) and full addresses **and phone numbers**.)
2. Your date of birth (DOB).