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## WHO NEEDS AN ESTATE PLAN

### I. Topics of discussion:

- A. What happens if I become disabled?
- B. What happens if my husband/wife becomes disabled?
- C. What happens if I die?
- D. What happens if my husband/wife dies?

### II. Specific areas of discussion

- A. Holding title to property and protecting it from creditors
- B. Estate Planning Tools (advantages and disadvantages)
  - 1. Wills
  - 2. Guardianships
    - a. property (conservatorship)
    - b. person
  - 3. Custodianships
    - a. property
    - b. person
  - 4. Powers of Attorney
    - a. property
    - b. health (advance health-care directive)
  - 5. Living Wills (advance health-care directive)
  - 6. Bank Accounts/Securities Accounts
  - 7. Life Insurance
  - 8. Retirement Plans (IRA's, Keogh's, TSA's, Annuities)
  - 9. Real Estate Ownership
  - 10. Digital and Electronic Assets and Powers
  - 11. Trusts
    - a. Living (revocable/irrevocable)
    - b. Testamentary
    - c. Totten/POD/TOD

### III. Probate (advantages and disadvantages)

### IV. Taxes (advantages and disadvantages)