

ANGEL ADVOCATES

ESTATE PLANNING. GUIDED BY LOVE. GOVERNED BY LAW.



ASSET



HEALTH



LEGACY



POTENTIAL
EXPLOITATION



LEGAL

1. Asset Advocate

- Do a complete inventory of all assets with the individual so they know what they are responsible for should something happen to you suddenly
- Do have the proper legal documents in place such as a power of attorney, will and trust so they can be empowered to step in without court involvement
- Do express your feelings and intent around your decisions, work with an attorney that can help you think through the consequences of your choices and the impact they will have on your family.
- Do make sure that you have organized your assets and determined with your attorney which assets should be in the trust and which should pass directly to beneficiaries or charities.
- Don't name anyone as a joint on any property or on any account unless you are married. Use the trust or power of attorney for them to help instead so you can stay in control.
- Don't sell any property or give any large gifts or advance an inheritance without talking with your attorney.

Connecting Conversation

Don't wait to discuss your wisdom and values

"This trust is a gift of love. It exists to enhance the lives of the beneficiaries..."

Who might be a good fit?

2. Health Advocate

- Do a complete inventory of doctors, medications, insurance information with the individual so they know what they are responsible for should something happen to you suddenly
- Do have the proper legal documents in place such as a advance health directive, living will, provider's order for life sustaining treatment, living care



plan, and HIPAA so they can be empowered to step in without court involvement

- Don't let anyone pressure you to have them listed as your agent. Name your ex-spouse if you like!

Connecting Conversation

Express your feelings and intent around your decisions, use a Living Care Plan that will guide your conversation and take you through the many options. Have this conversation with ALL of the loved ones who might influence your agent. My Living Care Plan module on <https://angel-advocates.learnworlds.com/> has step by step videos to help you out!

Who might be a good fit?

3. Legacy Advocate

- Do a complete inventory of your meaningful heirlooms at least the wedding rings!
- Do capture the story and value or legacy that item represents
- Do record a legacy audio or video interview
- Do write an ethical will/family letter to your loved ones to be given upon your passing
- Do have the proper legal documents in place such as a personal property memorandum and helpful information at passing
- Don't leave old lists behind if you change your mind! That is a bummer if you find out Grandma changed her mind and you don't get the wedding ring anymore.

Connecting Conversation

Send an email and ask if there is any particular item that has special meaning that they would like when you no longer need it (because of downsizing etc) including your family of affinity. Capture the story behind that item, bonus points for tying it into a value that you want to encourage like George Washington. I have a template I can share with you!

Who might be a good fit?



4. Potential Exploitation Advocate

- Do choose someone who you will listen to if you are about to do something dumb...but still have capacity
- Do choose someone who is not a beneficiary or related to you preferably

Connecting Conversation

Discuss what you would want them to do if you remarried your much younger girlfriend/boyfriend and decided to change your estate planning and disinherit your kids.

Who might be a good fit?

5. Legal Advocate

- Choose someone who does not just draft documents, choose an attorney who sees estate planning as an opportunity to deepen the connection you have with your family.
- Choose someone who has a system where they check in with their clients on a yearly or every three year basis to follow up and make sure that your documents, family relationships, asset levels, and the law all still work together.

Connecting Conversation

If you are curious about what would happen if you were to become incapacitated today with your current plan in place feel free to reach out and I can let you know how you can qualify for a complimentary appointment with me so we can get you the answers you need so you can have peace.

Who might be a good fit?



To claim your golden ticket please go to this website and
it will track your attendance today!
At your planning session we will review your current situation so you can understand
what would happen if you became incapacitated today.

<https://angeladvocateslegal.com/goldenticket/>