

WILLS
Your Basic “TO DO” Planning List
December 19, 2019

The work: Prepare for an efficient and peaceful transfer of control over cherished assets at death ~ *what if you do not make it home today?*

Common beliefs that lead folks astray:

- ✓ “I don’t have enough assets to justify a will”
- ✓ “I won’t be here, so it won’t matter to me”
- ✓ “Everyone will get along”

Organize your thoughts and seize control over your planning:

- Who* is in your family (what are the ages, personalities, conflicts)
- What* do you own (get the details)
- How* do you own it (get more details)
- Who* inherits (family members, charitable organizations, etc.)
- Who* should be in charge
 - ✓ Financial and medical “agent”
 - ✓ Guardian for minor children
 - ✓ Executor under the Will
 - ✓ Trustee of trust

Create your estate plan: Be committed to ensuring a peaceful, efficient, and economical transfer of assets to those you love or wish to benefit.

Powers of Attorney:

- Durable Power of Attorney for financial decision making
- Advance Directive for health care decision making

William B. Miller, Jr., Esq.
Langrock Sperry & Wool, LLP
PO Drawer 351, Middlebury, VT 05753-0351
802-388-6356
wmiller@langrock.com