



ESTATE PLANNING ESSENTIALS

**10 IMPORTANT STEPS TO GET YOUR
AFFAIRS IN ORDER**



ABOUT THE COMPANY

We are a full-service law firm with multiple offices located throughout Maryland. No matter the challenge you are up against, you can rely on Albers & Associates to be there for you every step of the way. We take the time to get to know our clients on a personal level. We listen to their stories, learn about their unique needs, and develop innovative legal strategies aimed at securing the best possible outcome for each individual case. As your legal team, we are prepared to fight tirelessly for you.

ABOUT ME



HOLLY MUSSELMAN

I bring years of practice experience in several legal backgrounds, including estate planning, bankruptcy, corporate counsel, small business organization, employment law, and more.



ASSET SUMMARY

(Titling of Assets)



Gather the titles & deeds for your homes, vehicles, and real estate.



Gather account/investment information.

LAST WILL & TESTAMENT

- Name a guardian for minor or disabled children.
- Determine which people/charities will receive your assets.
- Name a personal representative to carry out the terms of your will.
- Only dictates the distribution of assets in your individual name.

Will and Testa
Last will and Testament
of
Jane Doe

resident of Mignow (City),
memory, do make, publis
voke all previous will.

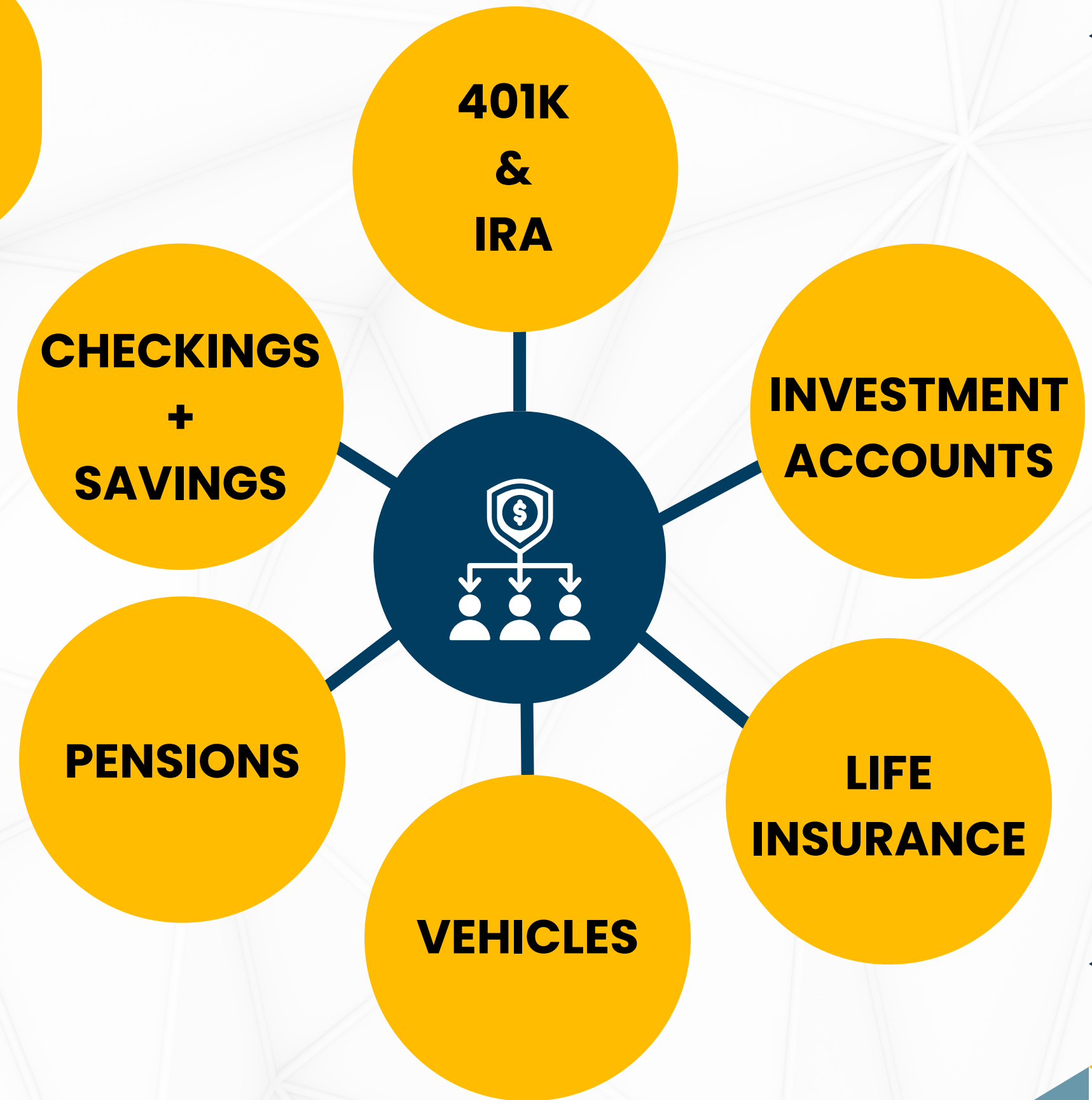
REVOCABLE LIVING TRUST

- List all personal property & decide which people/charities you want to receive each asset.
- Transfer your personal property & assets into the trust.
- Name a successor trustee to manage your trust after you become incapacitated or pass away.



BENEFICIARY DESIGNATIONS

Name a beneficiary for all non-probate assets, including:



ADVANCE HEALTHCARE DIRECTIVE

Outline your medical care preferences in your healthcare directive.

Name a healthcare agent to make important medical decisions for you in your healthcare directive.

FINANCIAL POWER OF ATTORNEY

Choose a financial agent to make important financial decisions on your behalf.

Avoids the process of petitioning for Guardianship

INSURANCE POLICIES/ FINANCIAL INFORMATION

- Gather copies of your life, health, car & home insurance policy documents.
- Create a list of your financial accounts & institutions (e.g., bank accounts, credit cards, mortgage, loans).



PROOF OF IDENTITY DOCUMENTATION

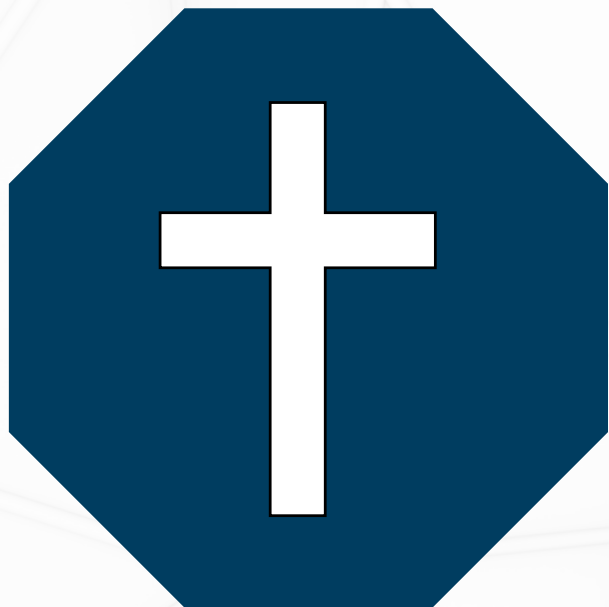


DIGITAL LOGINS & PASSWORDS

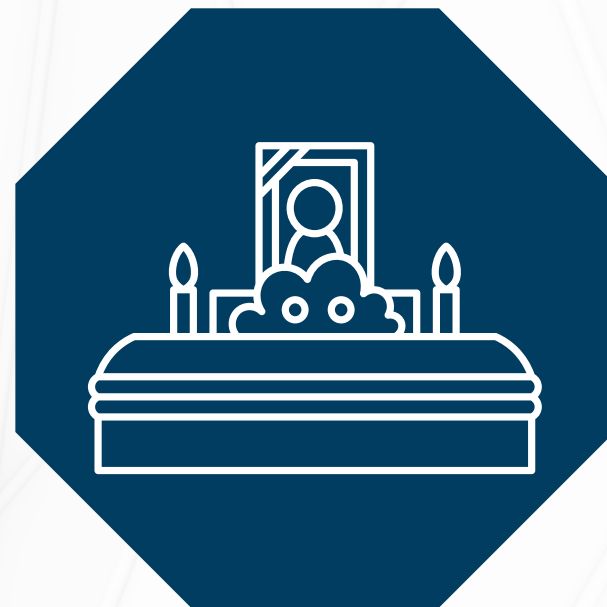
- Create a list of all your digital assets:
 - Bank & Financial Files
 - Social Media & Email Accounts
 - Logins for Streaming Services
 - Digital Files such as Photos & Documents
 - Designate a Legacy Contact



FUNERAL INSTRUCTIONS



**BURIAL OR
CREMATION**



**TYPE OF SERVICE
YOU'D PREFER**



**PASSAGES
READ**



**CHARITIES OR
DONATIONS**



**FLORAL
PREFERENCES**

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