



LIFE, ESTATE & INHERITANCE PLANNING

LERMAN LAW ASSOCIATES, PC

CRAIG R. LERMAN

ATTORNEY AT LAW

PLANNING TOOLS



LAST WILL AND
TESTAMENT



FINANCIAL
POWER OF
ATTORNEY



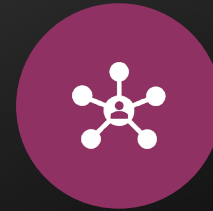
MEDICAL POWER
OF ATTORNEY



LIVING WILLS



HIPAA RELEASE



REVOCABLE
LIVING TRUSTS

TYPES OF ASSETS

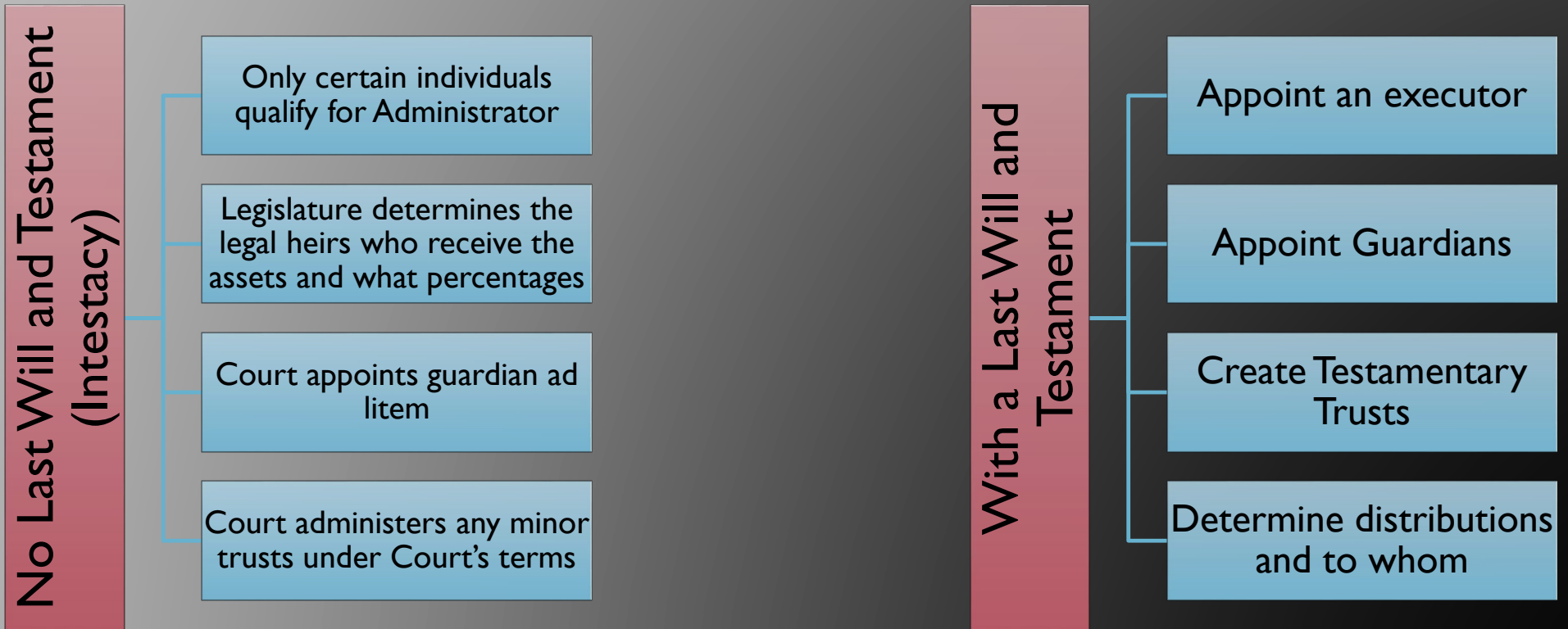
Probatable Assets

- Vehicles
- Personal bank accounts
- Tenant in Common or Single Owner Real Estate (non-survivorship deeds)

Non-Probatable

- Life insurance
- IRA
- 401(k)
- Survivorship Deeds and Accounts

SHOULD I HAVE A LAST WILL AND TESTAMENT



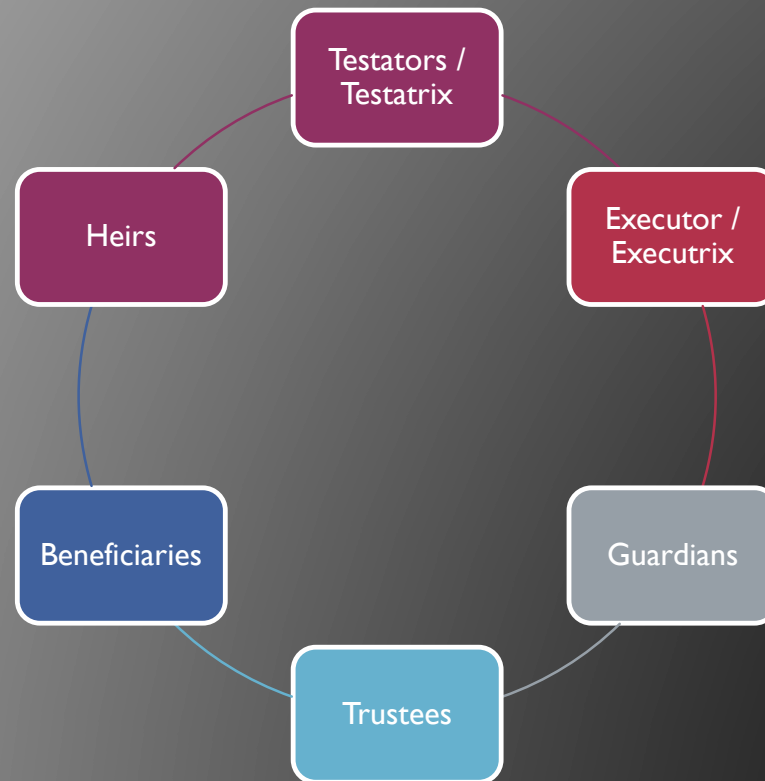
Simple
Outright
distribution

Pour-over
Wills

Will with
Testamentary
Trusts

TYPES OF LAST WILL AND TESTAMENTS

PARTIES TO A LAST WILL AND TESTAMENT

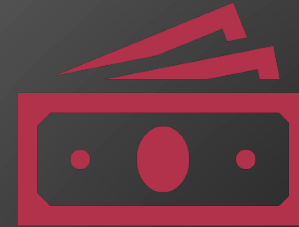


POWER OF ATTORNEYS



Medical Power Attorney and HIPAA Release

Decisions over medical treatment and care
Guardianship




Financial Power of Attorney


Financial Assets
Real Estate Assets
Banking
Litigation

LIVING WILLS

Extend life for as long as possible, using all medications, machines, or other medical procedures that in reasonable medical judgment could keep one alive.



Allow a natural death to occur. I do not want any medications, machines, or other medical procedures that in reasonable medical judgment could keep me alive but cannot cure an individual.



Refusal of any medications, machines, or other medical procedures that in reasonable medical judgment could keep me alive but cannot cure me, except as Food and/or Water and/or Artificial breathing

REVOCABLE LIVING TRUST

Certificate of Trust

Trust Agreement

Funding / Trust Assets / Assignments

TYPES OF REVOCABLE TRUST

TYPES OF TRUST

Individual
Trust

Spousal or
Partner Trust

DISTRIBUTION MECHANISMS

Distributions Outright

Separate Share and Single Beneficiary Trusts

Generation Skipping

Qualified Terminal Interest Trust (QTIP)



QUESTIONS AND ANSWERS

CONTACT INFORMATION



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