

Elisabeth J. Rubel PLLC

Estate Planning: Preparing for the first meeting

Congratulations! You took the first step of scheduling a meeting to begin the estate planning process. Prior to our first meeting, there are a few items you may want to give some thought to and discuss with your spouse, if applicable, as well as a few pieces of information you will want to have available when we meet:

Items to discuss

- Who you want to name as your first successor personal representative in your will
- Who you want to name as your second successor personal representative in your will
- If you have minor children, who you want to name as guardian
- Whether you want to be buried or cremated
- Whether you want to be an organ donor
- Who you want to name as your power of attorney
- Who you want to name as your successor power of attorney
- Who you want to name as your patient advocate
- Who you want to name as your successor patient advocate
- What your wishes are in terms of life support if you are terminally ill or in an irreversible coma
- Who you want to name as successor trustee(s) of your trust

Information to have available

- Names and addresses of your family members or anyone you want to name in your documents
- A recent property tax bill
- Generally, information on the types of assets you own, how you own them (sole, joint) and the approximate balances