

Estate Planning is for Everyone

Shrine of the Immaculate Conception, Atlanta, Georgia
Sunday, August 18, 2019

1. Advance Directive for Health Care

An Advance Directive for Health Care names an Agent (and Backup Agents) to act on behalf of the Principal to make healthcare decisions when the Principal is unable to communicate them him/herself. An Advance Directive can also include instructions for end of life care that will guide the Agent. This document provides space for special instructions to accommodate your personal and religious preferences. An Advance Directive can also include HIPAA authority.

Georgia Department of Health: <https://tinyurl.com/ADHC2016>

Georgia Health Decisions: <https://www.hcecg.org/CriticalConditionsPlanningGuide>

Archdiocese of Atlanta: <https://archatl.com/ministries-services/respect-life-ministry/end-of-life-issues/>

2. Durable Power of Attorney

A Durable Power of Attorney gives an Agent the authority to act on behalf of the Principal to make financial decisions. This could include such things as paying bills and taxes, managing income, giving gifts, changing beneficiary designations, and selling property. This document is both extremely powerful and highly customizable – the selection of an Agent should be made with great care.

3. Wills and Trusts

A Will distributes the assets of a person after his or her death and can also identify a testamentary guardian and conservator to care for the minor children of the decedent. A Trust creates a relationship with a Trustee who can manage and distribute the assets of a person both before and after death. These documents range from very simple to extremely complex.

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This sheet contains legal information – not legal advice. Please consult an attorney if you have questions.

4. Other Documents

Beneficiary Designations – Any insurance and retirement plans will ask for beneficiary designations; you also can add backup designations. Make sure your designations are coordinated with your estate plan in general.

Instructions/Guidance for the Care of Your Child - Consider creating a binder or notebook that will hold important information for each of your children: names and contact information of family members; doctors, tutors, coaches, etc.; immunization and allergy records; a copy of designation of standby guardianship; and whatever else you think would be useful.

5. A Few Pieces of General Guidance

COMMUNICATE – Make sure your health care agent, your agent under a power of attorney, and your family in general understand what you want.

Don't sign a document you don't understand. That's especially the case with documents that require witnesses or notaries.

Who you trust is your choice – don't let someone else make decision about your agents, executors, or trustees for you.

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