

ESTATE PLANNING

If you own property that matters to you or you have minor children, then you need to have an estate plan. Estate planning refers to the plan for the management and disposition of your property while you are alive (including if you become incapacitated) and after your death, it also refers to planning your health care if you become unable to take care of yourself.

The two most common reasons that people do not have estate plans is that it deals directly with the idea of mortality or they believe it is too expensive. First, I've found that most people experience a relief after they have put their affairs in order and have taken control of this part of their life. Second, there are a variety of ways of completing an "estate plan," from basic plans such as a will to more sophisticated plans such as a trust.

There is no "one plan fits all" approach to deciding what is in your best interest for estate planning. That is why I offer many options and give you the choice based on your needs and cost. I do almost all estate planning on a "flat fee," which means you do not pay me by the hour, but by the project. I evaluate your objectives and economic situation to decide the best approach. I also attempt to minimize future controversy.

PROBATE

Probate refers to the court process by which a personal representative of a decedent named in a will collects the decedent's assets and distributes them to the beneficiaries named in a decedent's will. The personal representative is also responsible to pay the liabilities of the decedent from the decedent's assets. There are ways to avoid the probate process such as creating a trust. Creation of a trust can save thousands in attorney's fees because there is usually no need for court intervention after the creation of a trust.

GUARDIANSHIP AND CONSERVATORSHIP OF AN ADULT

Guardianship and conservatorship of an adult refers to the court process by which a relative or friend obtains legal and financial control over an incapacitated person, thus becoming that person's guardian and conservator. Cognitive impairment, Alzheimer's, and brain damage are common reasons why an adult would need another person to make his or her medical and financial decisions.