



# ESTATE PLANNING GUIDE

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# Hello!



I am Sarah Jordan, owner of Jordan Law Firm and a Washington Estate Attorney. If you need help with estate planning, get in touch with me and I would be happy to talk you through it.

Estate planning is the process of making a plan for your family, health, and asset transfer in case of possible incapacity or death. It is an important way to care for yourself and your family--and ultimately, to get organized.

This guide is intended to help you make real progress on your plan. In addition, I invite you to attend a free Wills Workshop (register online at [jordanlawfirmpllc.com/wills-workshop](http://jordanlawfirmpllc.com/wills-workshop)) and to get in touch to schedule a consultation with me.

Sincerely,

*Sarah Jordan*

# Planning is Important

Making an estate plan is important so that your choices are honored and your loved ones have an organized plan to follow. Also consider...

- Appoint a guardian for minor children
- Provide clarity to your loved ones about your wishes
- Maintain control over your health care choices
- Encourage family harmony
- Choose who will be in charge of your estate
- Avoid last-minute decisions
- If your spouse/partner dies, you understand the family's financial picture
- Bonus: Finally get this off your to-do list!



## Details



Done in 4-6 weeks



Flat fees available

## Also...



Gain understanding about what an executor does



Plan for kids' college expenses or other needs



Ensure your family can access your online photos



Arrange for pet care



## Goals

Your planning goals are integral to the question of how to develop your estate plan. Is your main concern guardianship for your children? Maybe it's simply clarity and organization. Or it could be that you want to ensure a family member with special health needs is provided for. Getting to the bottom of what motivates you is the key starting point.



## Family

Your family makeup and dynamic impacts your plan. For example, married couples should factor in community property laws. Parents must consider guardianship and asset management for minor children. Family members with certain disabilities will not want to be bumped out of eligibility for government benefits. Strained relationships are also worth considering.



## Assets

Planning is a good idea whether you are well-off or if you have a modest estate. We think through the practical and legal implications of transferring assets, no matter the value, to various heirs, such as minor children, extended family, and charities or organizations. High net worth clients may require tax planning, but modest estates deserve care too.

# A Will

A will nominates a personal representative (aka 'executor'), appoints a guardian for minor children, and directs the distribution of your assets.

Also note:

- Each spouse should have their own will.
- Wills must be witnessed by two people who are over 18 and who are not family or felons. Notarization is not a requirement for wills, but we always have a notary sign a witness affidavit.
- Wills can be updated at any time with what's called a 'codicil.'
- A will neither requires nor avoids probate, which depends on other factors.



## Other Tools

- Powers of attorney
- Health care directives
- Community property agreements
- Deeds
- Disposition of remains instructions

## Trusts

There are entities that govern asset management. In general, trusts share four elements:

- Trustee: someone to manage the trust assets
- Beneficiary: the person or organization that benefits from the trust assets
- Trust assets: what the trust or trustee owns
- Distributions: how, when, and why trust assets are given to the beneficiaries

One way to categorize trusts is...

- > Testamentary trusts: created in a last will
- > Living trusts: created during someone's life and funded during their lifetime

# Make progress right now

Why wait? Let's get started right now. Here are some key decisions you need to make.

## WHO WILL BE YOUR PERSONAL REPRESENTATIVE?

Who will get your final debts paid and distribute your assets? Many people choose their spouse. It should be someone with good judgment and organizational skills.

## WHO WILL BE YOUR CHILDREN'S GUARDIAN?

The guardian is appointed if both parents are deceased or the sole remaining parent is incapacitated. Choose the person who is best suited to care for your child's day-to-day needs in the next three years.

## WHO WILL BE YOUR HEALTH CARE AGENT?

This person will carry out your health care wishes. Choose someone who will respect your wishes even if they do not agree personally.

## WOULD YOU LIKE TO GIVE SOMEONE A PARTICULAR ITEM OF YOUR PROPERTY?

If you have any family heirlooms or items of sentimental value or other significance to you, list them here.

## WHO SHOULD GET THE REST OF YOUR ASSETS?

After you give specific gifts, you will leave the rest of your assets to people or an organization. Often the bulk of an estate is left to a spouse, children, or split among various people.

# More progress...

Keep going. Here are some additional key decisions you need to make.

## FOR ASSETS LEFT TO A CHILD, HOW SHOULD THEY BE USED/SPENT?

If your child under 18 inherits assets (usually through a minor's trust), how should the funds be used? Examples include education, health care, and travel to visit family.

## HOW SHOULD YOUR HEALTH CARE AGENT MAKE DECISIONS ABOUT YOUR HEALTH?

If you cannot communicate your wishes about your health, what should your health care agent know about your health?

## WHO SHOULD BE YOUR FINANCIAL ATTORNEY-IN-FACT?

Your attorney-in-fact acts on your behalf with respect to financial matters. They must act in your best interest or according to your wishes. Choose someone trustworthy.

## WOULD YOU LIKE TO DONATE YOUR ORGANS AFTER YOUR DEATH?

Get more specific than 'yes' or 'no.' Consider the difference between transplant versus research purposes. What about exclusions? Examples: no donation of eyes or brain.

## WHAT IS THE PLAN FOR PET CARE IF YOU CAN NO LONGER DO IT?

For many, pets bring immeasurable joy and are loved like family. Who should care for your pets if you cannot? Who is their veterinarian? Medications or special food?



## What does the attorney do?

Elicits the *right* information from you, meaning the attorney knows what to watch for, what details or circumstances need care and attention--you're not expected to know what's important and what's not.

Compares your circumstances against a great body of legal precedent in which things went awry, and makes a sound plan that avoids all those pitfalls.

Partners with you. Of course, the attorney drafts legally-sound documents, but you will work together as a team because you contribute that intimate knowledge of your family, assets, goals, and wishes.

Nurtures a professional relationship that potentially lasts decades. The beauty of working with an attorney you trust is that you, and your family members, have a life-long resource who understands your life and legacy and can bridge the gap when your will or trust eventually needs to be administered.

## What else?

- ✓ Helps you choose the right documents
- ✓ Determines the pertinent provisions
- ✓ Makes sure you understand your plan
- ✓ Provides a paper and digital copy of the documents
- ✓ Oversees the notary and witness signatures
- ✓ Checks in with review reminders

Attorney





NEED HELP?

**SCHEDULE A CALL**

CONTACT:

[FRONTDESK@JORDANLAWFIRMPLLC.COM](mailto:FRONTDESK@JORDANLAWFIRMPLLC.COM)

OR VISIT: [JORDANLAWFIRMPLLC.COM/CONTACT](https://www.jordanlawfirmpllc.com/contact)

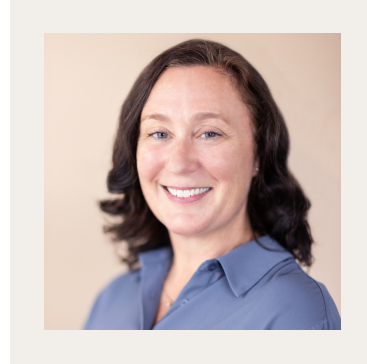
# Our team



**Sarah Jordan**

Owner & Attorney  
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Sarah provides legal counsel, research, drafting, and strategizing on all client matters.



**Jennifer Evans**

Legal Assistant  
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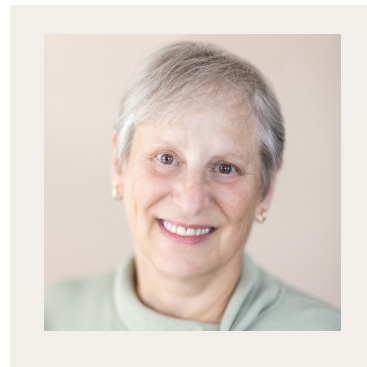
Jennifer helps draft legal documents and is our all-around problem solver.



**Isabel Zyla**

Administrative Assistant  
isabelz@jordanlawfirmpllc.com

Isabel takes care of clients and handles office operations.



**Deborah Binder**

Outreach Specialist  
deborahb@jordanlawfirmpllc.com

Deborah provides outreach to the community on our estate and probate services.



## confidentiality

We keep confidential all information relating to you, including the fact that you are a client, the content of our conversations, and your personal information. Sarah can invoke attorney-client privilege if she is ever compelled to reveal your information.



## communication

We keep you informed about the status of your legal matter. Phone and email are the best ways to contact us. We can also video conference through Skype or Zoom. In-person meetings, except for notarizing, are temporarily suspended.



## conflicts

We avoid conflicts of interest. We check for conflicts before representing you to make sure that Sarah can be your attorney. If, during the course of working with you, a conflict of interest arises, Sarah may have to withdraw from working on your project. But don't worry; it's rare.

# Our Services

Estate Planning	Estate Administration	Also...
Wills & Trusts	Probate	Deeds
Powers of Attorney	Trust Administration	Prenuptial Agreements
Health Care Directives & HIPAA	Small Estates	Community Property Agreements
Estate Plan Review	Advice & Counsel	Estates for Creatives
Minor Guardianship	Beneficiaries & Heirs	Pet Considerations
Business Succession	Estate Assessments	Notary Available



We would love to connect with you! Take a look at our social media handles below and follow us or give us a 'heart' on NextDoor.

Of particular interest may be our Facebook Group called Wills, Trusts, and Guardianship Washington State, where we post tips, updates to the law on trusts and estates, and answer members' questions on these topics.

Register for a free Wills Workshop at [jordanlawfirmpllc.com/wills-workshop](http://jordanlawfirmpllc.com/wills-workshop).

It's always a pleasure to connect with clients and our community, so find us and reach out!


*Sarah Jordan*

# Social Media

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