



Design Meeting Considerations

Thank you for choosing Wall Group Law to bring you peace of mind by creating an estate plan for you and your family. At this point, you should have completed the first meeting and received instructions on the financial information we still need to complete your plan. At your next meeting, the Design Meeting™, you will meet with an attorney for approximately one to two hours (depending on your particular situation), to design your customized estate plan. **In order to prepare for the Design Meeting™** and make it meaningful, below is a list of issues for you to consider. Please fill this form out as best you can before your meeting.

1. **Who do you choose to make legal and financial decisions for you if you are unable to make them yourself? This should be someone you trust completely with money. We recommend one person be named with two alternates. Your spouse can be included as an option. Include full names, addresses, and phone numbers if they were not included on your personal information form.**

2. **Who do you choose to make your health-care decisions? (Ex. whether or not to “pull the plug.”) Again, we recommend a primary and two alternates. Include full names, addresses and phone numbers.**

3. **When would you consider yourself incapacitated (unable to make decisions)? Who should make this decision?** The default is when two doctors certify you are unable to comprehend the results of your actions. Typically, we recommend you name a panel of 3 to 5 people you trust who, together, would make this decision.

4. **If you fell ill and could not care for yourself, would you want to remain at home as long as possible? Under what circumstances would you permit care in a nursing home or other facility? Would cost matter?**

5. **Do you wish to leave detailed instructions for how you wish to be treated if you have to go into a nursing home or other facility? Would you want to be taken outside? What kinds of foods do you like and dislike? What are your hobbies? What do you like to read? Watch on TV? Would you want to go out in public? If so, where? Would you want to be dressed and groomed daily? Consider any other specifics that would enhance your quality of life if you could no longer speak for yourself.**

6. **If you became terminally ill or in a coma, would you want to "pull the plug" or would you want life support to prolong your life? What if you had advanced dementia or other severe disease?**

7. **After your death, who would you trust to manage and distribute your assets? (i.e. your Personal Representative or Trustee) Again, we recommend a primary and two alternates. Include full names, addresses and phone numbers.**

8. **Who do you want to inherit your assets when you die?** List at least a primary and an alternate beneficiary in case your primary beneficiary dies before you. You may name an individual, a class of people, a charity or church. Ex. My spouse, then my children, then my grandchildren. You may list percentages or dollar amounts.

9. **Do you want to disinherit anyone?**

10. **Are there any specific bequests you want to make when you die?** (i.e., "my grandmother's china to my sister Susan")

11. **Do you want the deceased spouse's assets to be protected after death from the surviving spouse's potential nursing home costs?** Protecting these assets can save thousands of dollars a month if the spouse needs a nursing home level of care later in life.

12. **Do you want the deceased spouse's assets to be protected after death in case the surviving spouse remarries or falls victim to a scam?** (“I don’t care what he does with his half of our assets, but my assets are going to the kids!”)

13. **Do you still want the protections described above if it means the surviving spouse will NOT be in control of the deceased spouse's assets?** You would name a trusted person to be in control.

14. **After you and your spouse have died, do you want your beneficiaries to receive an “open box” (your beneficiary has full control but the inheritance is vulnerable to creditors, predators, divorce, and estate tax) or a “closed box” (inheritance is protected from creditors, predators, divorce and estate tax but your beneficiary gives up some control for life)?**

15. **When your beneficiaries die, do you want what is left of their inheritance to remain in the family (ex. go to grandkids)? Or can they distribute the remaining assets to anyone they want?**

16. **At what age should a child beneficiary receive their inheritance outright?** (State law default says 18.) **Should they inherit all at once or in staged distributions?**

17. **Do you want to place any other restrictions on your beneficiaries' access to their inheritance?**

18. **In a disaster where all of your intended beneficiaries died before you, who would you want to inherit your assets?** Default is half to each spouse's closest living relatives.

19. **Do you want to leave anything to charity? Name the charity and amount or percent.**

20. **If you are creating a trust, what would you like to name your trust?** These trusts are personal to you and, like a corporation, they can be named anything you like.

21. **If you are creating a Medicaid or VA asset protection trust, we will name lifetime beneficiaries who have the right to receive money from the trust while you are still living and death beneficiaries who inherit after your death. Are there any death beneficiaries who have financial, health, substance abuse, or other issues and who SHOULD NOT be lifetime beneficiaries?**

22. **What do you want done with your remains?**

Please fill this form out and bring it with you to the meeting. You may ask the attorney any additional questions or raise any additional issues you feel are relevant to your estate plan. We look forward to seeing you at your Design Meeting™.