

Estate Planning Covers More Than You Think!

Estate Planning includes both lifetime and at-death planning to account for the possibility of incapacity and the certainty of death.

Lifetime Planning Coverage

- General Durable Power of Attorney
- Medical Directives (HIPAA, Health Care Power of Attorney, Living Will)

At-Death Planning Options

- Last Will and Testament
- Revocable Living Trust

Planning for Incapacity

Documents planning for incapacity are like insurance, hopefully you never have to use them but if incapacity does occur then they are beneficial to have.

General Durable Power of Attorney

- ◇ Gives named individuals authority to handle your financial and legal matters if you are unable to.

HIPAA Authorization

- ◇ Gives named individuals the authority to receive protected health care information.

Health Care Power of Attorney

- ◇ Gives named individuals authority to make health care decisions for you when you are deemed to lack capacity.

Living Will

- ◇ Memorializes end-of-life decisions regarding life support, organ donation, and artificial nutrition and artificial hydration.

Last Will and Testament

A will is a document that sets out the disposition of your assets after your death.

Court Process Required

- ◇ The court appoints the Executor of your estate to take over your affairs after your death.
- ◇ Assets titled in your name without right of survivorship or beneficiary designations must pass through probate.

Public Record

- ◇ A will is open to creditor claims and is more prone to contests due to public and legal notice requirements.

Time-Consuming

- ◇ Distributions of assets may be delayed by 12-months or even longer.

Revocable Living Trust

A trust is an agreement providing instructions as to how to distribute assets during your life and after your death.

No Court Process Required

- ◇ Your Successor Trustee takes over after your death, or during your incapacity, without court involvement.
- ◇ Assets avoid probate if they are in your trust or your trust is named as the beneficiary, and if the trust is properly set up.

Private Matter

- ◇ Administration occurs privately between trustees and beneficiaries.

Timely

- ◇ Distribution of assets happens with little to no delays.

susanhuntlaw

Wills • Trusts • Estate Planning • Probate

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Why should you choose Susan Hunt Law for your Estate Planning Needs?

Traditional Plans

Transaction Focused

Traditional lawyers are focused on merely drafting your documents and designing your plan once. They likely will not reach out to you about changes in the law or ask if your situation has changed over the years resulting in the need to update your estate plan.

Pushed and Uninformed Decisions

Has someone told you that you absolutely need a trust or that everyone needs a trust? (Which often is more expensive than a Will centered plan). As traditional lawyers are transaction focused, they tend to push the product that gives them the most return without educating you of your options.

Uncollected Assets

Again, traditional lawyers often prepare your documents for the one-time transaction and that is it. This can leave your assets at risk of being overlooked or lost and ultimately end up with the North Carolina Department of Unclaimed Property.

Guardian Nomination

Naming long-term guardians in a Will is likely the only way traditional lawyers work to protect your minor children. This could leave your children at risk of being taken into the care of strangers or someone you do not want until a Court gets involved.

Susan Hunt Law Plans

Relationship Focused

Our goal is to build a lasting relationship with you so we can ensure your plan stays up to date and works when your family needs it. To do this, we personalize your plan to your current situation and provide a complementary review of your plan every 3 years!

Educated and Empowered Decisions

Not only do we educate you about the difference between a will and a trust, we also provide the pros and cons of choosing one plan over the other based on your specific situation. You will make informed decisions on the route you want to move forward with to protect your assets and your family.

Inventory of Assets

We inventory your assets, ensure your assets are owned in a way providing the most protection for you and your family according to your estate plan, and work with you to maintain this inventory throughout your lifetime.

Kid's Protection Plan

For every family with minor children we create a Kid's Protection Plan at no additional cost. This Plan fills the holes that would leave your children at risk of being cared for by strangers until the long-term guardians are appointed by the Court.

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