



ESTATE PLANNING
LAW CENTER PLLC

Planning For Life

FIVE STEP ACTION PLAN

- 1** Make appointment with Susan Muscari to discuss estate planning options.
- 2** Write down your objectives and bring to your appointment with Susan (for example):
 - a. Avoid Probate
 - b. Minimize attorney fees
 - c. Tax Planning
 - d. How to distribute at death
- 3** Make a general inventory of your assets and debts, including:
 - a. Real Estate
 - b. Financial Accounts
 - c. Brokerage Accounts
 - d. Insurance
- 4** Have legal documents prepared.
- 5** Change title on assets from individual names to your name as Trustee.

(This is called funding and Susan performs this service for the assets that you disclose to her.)