LAW OFFICE OF MERRILL A. HANSON
A PROFESSIONAL CORPORATION

150 E. Meda Ave., Ste. 200
Glendora, CA 91741
626-594-7997

www.MerrillHanson.com

merrill@merrillhanson.com

Estate Planning Consultation Preparation

Congratulations! You are now one of the responsible individuals who have decided it's time to prepare ahead. We do custom estate planning to help individuals like you design their future the way they like. Our motto is "*Your Life. Your Legacy.*" To get started, please fill in the enclosed questionnaire and return it to us in the enclosed envelope, or by email. Also, here are some things you can be thinking about:

1. Be ready to discuss your family, trusted friends and relatives.
2. Think of a list of people you would trust to do the following:
    - Be in charge of your health/life if you were very ill and couldn't do anything.
    - Be in charge of your property and personal affairs if you couldn't.
    - Look after your minor children if you couldn't.
3. Think about how and where you would like your wealth to go when you pass away, for example:
    - To family, friends, churches, and charities.
    - Do you have any special family heirlooms that should go to a specific person?
    - What happens if your named beneficiary has already passed away?
4. Be prepared to discuss your assets and your total net worth, such as:
    - Real Estate: houses, vacation homes, rentals, land, etc.
    - Personal Property: jewelry, antiques, art, coins, collections, household furnishings, etc.
    - Vehicles: boats, recreational vehicles, trailers, etc.
    - Liquid Cash/Bank Accounts: checking, savings, credit unions, other deposits
    - Accounts Receivable: tax refunds, unsecured notes, deferred compensation
    - Life Insurance policies and annuities (and type)
    - Investments: stocks, bonds, secured notes, mutual funds, etc.
    - Retirement Accounts: Pensions, IRAs, 401Ks, etc.
    - Business Interests: partnerships, privately held companies, etc.
5. Be prepared to discuss liabilities/debts (also, if married, whether held jointly or separately).
    - Student loans? Taxes? Spousal/child support arrearages?
    - Loans: mortgages, secured and unsecured debts, vehicle loan? Credit cards?
6. What are your personal values? Do you have religious beliefs and preferences?
7. Prepare a list of your concerns and questions about your estate plan. For example:
    - How does a trust work?
    - What is probate?

Thank you for choosing the Law Office of Merrill A. Hanson for your estate planning needs. We look forward to serving you! When we receive your completed questionnaires, we will contact you to schedule a follow-up.

Very truly yours,

Merrill A. Hanson, Esq.