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FIRST STEPS TO SMART PLANNING AND PEACE OF MIND

Congratulations! You have decided to be a smart planner and to give yourself and your family the financial benefits and the peace of mind of smart planning. The first step is to list the people you appoint to help you. The second step is to list your beneficiaries and their relationship to you.

Your name(s) and address as you want it to appear on the documents. Your signature on the documents will match your name on the documents.

Your Name Address: _____

Your Name Address: _____

REVOCABLE LIVING TRUST

Your Successor Trustee carries out your directions in your trust. Successor Co-Trustees generally work together.

Name of Successor Trustee or
 Successor Co-Trustee Address: _____

Name of Alternate Successor Trustee or
 Successor Co-Trustee Address: _____

DURABLE POWER OF ATTORNEY

Your agent or co-agents act on your behalf during your lifetime to assist you with your finances and your general medical care. Co-agents can work together or independently.

Name of Agent or Co-Agent

Name of Alternate Agent or Co-Agent.

DESIGNATION OF PATIENT ADVOCATE

Your patient advocate speaks for you if you are unable to communicate and follows your directions in your Designation of Patient Advocate regarding when you want or do not want life support. Patient Advocates are listed one at a time in the order you want them to speak for your.

_____ Address: _____
Name of Patient Advocate

_____ Address: _____
Name of alternate Patient Advocate

BENEFICIARIES

Please list your beneficiaries and their relationship to you. Name a contingent beneficiary if the primary beneficiary predeceases you.

Name of Beneficiary

Beneficiary's Relationship to You

SMART PLANNERS ARE THOUGHTFUL CARING PEOPLE

We are always pleased to answer your questions and assist you regarding estate planning. Please feel free to call us (313 584 1460) or to send an email (info@colarossilaw.com).

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