THINGS TO CONSIDER:

Estate Planning Overview

PRESENTED BY:

STAUTZ LAW

Prepared by Andy Stautz, Indiana Attorney. Copyright 2025.

Let’s Get Started.

Congratulations!

I’m so glad you’ve decided to start working on your estate plan. I know it can be intimidating to begin, but the work you’re putting in now will really benefit you and your loved ones in the future.

I’ve put together this brief guide so that you can start to think about what you value, whom you need to plan for or protect, and how we can craft an estate plan that works for you. Everything here is for you – it’s not homework! If you’re overwhelmed, or have questions, don’t worry – we’ll go over all these topics at your initial planning meeting. This is to help give you a head start so you can be as satisfied as possible with the plan we put in place.

Our Objective:

1. Learn about the **PEOPLE** in your life.
2. Understand the **PROPERTY** you own.
3. Devise a **PLAN** to get the property to the people

Step 1: People

THINK ABOUT YOUR FAMILY AND LOVED ONES. WHAT DO THEY NEED FROM YOU? WHAT CAN YOU DO FOR THEM?

- **Spouse.** Does your spouse work? How will he or she pay the bills if you're not around? What about second marriages? Remarriage?
- **Children.** Minors (children under 18) don't have full legal powers. Do you need to designate a guardian for their physical or financial welfare?
- **Special Needs.** Do you take care of someone with special needs? How will that care continue? What about qualifying for government benefits?
- **Problem Behavior.** Is anyone you love struggling with addiction, gambling, or debt? How do you want to protect that person after you're gone?
- **Extended Legacy.** Are you interested in providing for grandchildren or even more distant descendants? Do you want to leave a multi-generational legacy?

Step 2: Property

THINK ABOUT WHAT YOU OWN. WHERE IS IT? HOW IS IT TITLED? WHAT DO YOU WANT TO HAPPEN TO IT?

- **Inventory.** What all do you own? What's the value of your assets and liabilities? Is your property concentrated in a few assets or spread across many? How are those assets titled?
- **Management.** Who manages your financial affairs right now? If you weren't there, could someone else take charge? Would that be easy or difficult?
- **Disposition.** Do you want specific items to go to specific people? Is there anything you want to stay in the family? How much control do you want to exercise?

Step 3: Plan

This is my job!

At our initial planning meeting, we're going to talk over the topics and questions I outlined in this guide, and I'm going to use your answers to come up with the **legal tools you need to make it happen.**

Depending on your circumstances, I might recommend:

- **Will-Based Plan**
  - Simple, inexpensive, timeless
  - Gives instructions on how your property goes to beneficiaries
- **Trust-Based Plan**
  - Private, efficient, precise
  - Avoids probate
  - Allows extensive control over disposition
- **Accessory Documents**
  - Financial Power of Attorney
    - Plans for your incapacity
    - Avoids guardianship
  - Healthcare Directive
    - Gives instructions on your wishes
  - Transfer on Death Deed
    - Avoids probate on real estate

If you're interested in learning more about these specific legal tools, you can learn more on my blog: https://stautzlaw.com/blog/.

But don't worry! I'll explain the tools we're going to use, so you can rest easy knowing you understand how your plan is going to work.

Thanks for Choosing Stautz Law.

Your trust means everything to me. I'm honored to be entrusted with your estate plan, and I look forward to seeing you soon.

Our Next Steps:

1. Take time to reflect. Remember the three P's: People, Property, Plan
2. Fill out the Intake Questionnaire
3. Come to the **Initial Planning Meeting** and have a great discussion of your goals.
4. Hear my proposal for your plan.
5. Accept the proposal, pay my fee, and have me write it up!
6. Come to the **Signing Meeting** and get your plan formally executed.

Book Online!
stautzlaw.com/getting-started/booking/

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