



Legacy Estate Planning Worksheet



About Our Firm

Legacy Estate Planning, LLC was founded by Steve Waltar in 2000, with a mission to help people and their families build and maintain effective estate plans, and those struggling with the loss of a loved one navigate the required legal processes. Our firm is dedicated to providing people with estate planning education and pride ourselves in personalizing every estate plan to fit our client's individual needs.

Our services include: Estate Planning (Wills and Trusts), Elder Law and Medicaid Services, Probate and Trust Administration, Powers of Attorney, Health Care Directives, Special Needs Planning, Pet Trusts and more! We offer **FREE Educational Webinars!** Learn how to use simple legal strategies to help make your wishes known, keep peace in the family, and ensure that life is as easy as possible for your loved ones.

Are You Ready to Plan?

Estate planning is crucial for individuals who want to ensure the smooth transfer of their assets and wealth to their chosen beneficiaries after their passing. It involves making important decisions and creating legal documents to outline how one's assets should be managed and distributed, as well as addressing various other matters. Here are few questions to keep in mind when preparing to meet with an attorney to create your plan.

Is there someone you would want to care for your children if you are unable to?

Do you feel comfortable with your children inheriting money when they are 18 years old?



"Mind of an Attorney,
Heart of a Pastor"
-Steve Waltar, Attorney & Owner



"Helping Families
Protect their Legacy"
-Andrea Lee, Attorney

If you are incapacitated, who would you want to make financial decision on your behalf?

Who would you trust to manage your Financial and Legal affairs?

Do you want to keep your affairs private? **YES / NO**

Do you want a plan that is flexible if you move out of state?
YES / NO

Would you like to avoid estate taxes, protect your heirs from divorce, or other threats? **YES / NO**

These legal documents provide individuals with the ability to plan for various life situations, from healthcare decisions during incapacity to end-of-life arrangements. They offer control, protection, and peace of mind for both you and your loved ones by ensuring that important matters are handled according to your preferences and values.

Do you wish to be kept alive by artificial means if you can no longer communicate and a licensed physician deems that you are at the end stage of a disease which will take your life within a short period of time?

YES / NO

Do you wish to be kept alive by artificial means if you can no longer communicate and a licensed physician deems that you are at the end stage of a cognitive illness such as Alzheimer's or Parkinson's?

YES / NO

If you do not wish to be kept alive by extraordinary means, do you want to receive artificial hydration, artificial nutrition or both artificial nutrition and hydration?

- ☐ **NO**
- ☐ **YES, ARTIFICIAL HYDRATION**
- ☐ **YES, ARTIFICIAL NUTRITION**
- ☐ **YES, BOTH ARTIFICIAL NUTRITION AND HYDRATION**

Do you want your health care agents to consult with the doctor before a final decision is made regarding your end of life care?

YES / NO

Do you wish to be an organ donor? **YES / NO**

Do you wish to donate your body to medical science? **YES / NO**

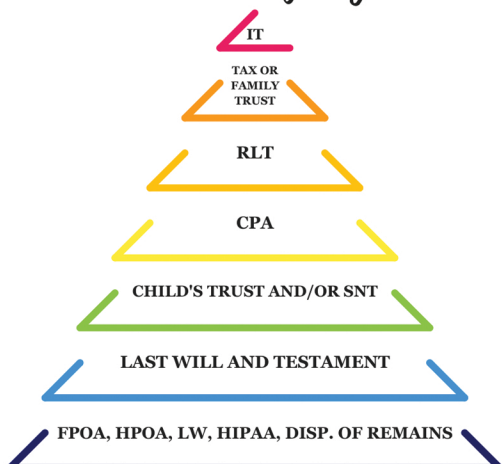
Which one do you prefer?

- ☐ **BURIAL**
- ☐ **CREMATION**
- ☐ **GREEN BURIAL**
- ☐ **RECOMPOSE**
- ☐ **OTHER:** _____



Not ready to make a decision just yet? No worries, we can always leave this document blank until you are ready.

Estate Planning Pyramid



"Estate Planning is like a pyramid. Every adult, whether they are 18 or 81, need the basic estate planning documents."

The Basic Estate Planning documents include Financial Power of Attorney (FPOA), Healthcare Power of Attorney (HPOA), Health Insurance Portability and Accountability Act (HIPAA), and Disposition of Remains.

CONTACT US TODAY!

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