

## ***What Documents Do I Need?***

It is often difficult to discuss what may happen in our lives in the event of our incapacity or death; however, not planning for these events can be not only costly, but can also present a hardship for those we leave behind. Texas has a relatively simple Probate system (administration of estates) if you have a will, which is drafted to take advantage of this simplicity. Others may choose to use a Trust in order to avoid Probate entirely. The Guardianship system (court determination of a guardian for the incapacitated) can be much more costly and complicated without the proper documents drafted and executed in advance. The following is a list and brief description of documents which our firm can draft for you based upon your needs.

**Will**– Transfers property to your chosen beneficiaries upon your death. Your Independent Executor (personal representative upon death) will file your death certificate, along with your will and other legal documents which an attorney can prepare with relative ease.

**Trust**– Some clients prefer to create a trust during lifetime and transfer their assets into the trust. Upon death the Successor Trustee, chosen by the client, can administer and transfer the assets without the requirement of going to court or filing a probate.

## **WILLS, TRUSTS & ESTATE PLANNING**

**Medical Power of Attorney**– This document allows you to appoint now, the individual (as well as alternates), whom you would like to make medical decisions for you in the event that you are unconscious due to an accident or illness.

**Declaration of Guardian for Estate and Person**– This document allows you to appoint now, the individual whom you would like to make decisions about the care of your person and the management of your estate if you are completely incapacitated.

**Durable Power of Attorney**– This document allows you to appoint now, an individual to perform a multitude of business and financial tasks on your behalf, either immediately, or in the event of incapacity.

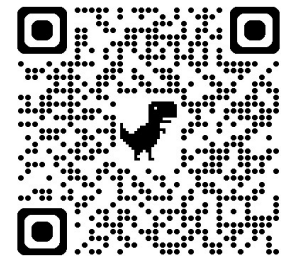
**Directive to Physicians**– (Living Will) This document allows you to choose now, whether you would like to discontinue, or continue to rely on, life sustaining support in the event that your physician determines you have a terminal or irreversible condition in the future.

**Appointment of Guardian for Minor Child** – This document allows you to appoint now, the individual/s who you would like to have care for your minor children in the event of your death or incapacity.

**Flat Fee Estate Planning Packages** include a comprehensive client consultation and drafting all the documents you select with the guidance of your attorney. There are no hidden fees. Our packages also include the facilitated execution of all of the documents to Texas standards. We provide all witnesses and notaries to insure proper execution. We will retain copies of your documents and provide you with your original documents as well electronic copies.

Additional Estate Planning options are available, including Lady Bird Deeds, Transfer on Death Deeds, Survivorship Agreements, etc. Please contact us for a consultation regarding your Estate Planning, so that we may determine which documents will best accomplish your goals

More information may be found at our website: [www.heritagelawtx.com](http://www.heritagelawtx.com)



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## **PROBATE**

The loss of a loved one is a time when you need to grieve, comfort other family members, and make numerous other arrangements for your loved one and for your future. Whether your loved one died with a trust, will or without a will, the legal process involved with a trust or estate can be daunting, confusing and sometimes overwhelming. It is our desire to help you reduce your stress by handling legal matters for you in a compassionate, as well as efficient, manner.

If your loved one did not leave behind a will to advise you on how to dispose of the remaining estate, navigating through the Texas Estates Code to ensure legal requirements are met can be a stressful experience and a tedious task. Texas law makes specific provisions for how personal and real property should be distributed and to whom the distributions are to be made. Consulting with an attorney can help you to avoid pitfalls and allow for the smooth and

***In addition to Wills, Trusts, Estate Planning & Probate, our firm also handles: Family Law, Adoption, Name Change, Personal Injury, Real Estate Transfers.***  
***We would be happy to assist you!***

# ***Wills, Trusts Estate & Probate Services***



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