



Living Trust Arizona.com
Foundation for Estate Plan

Before creating your **Will or a Living Trust**, take time to review these decisions:

1. Choose 2-3 people to make your medical decisions if you are incapacitated.
2. Choose 2-3 people to make your financial decisions if you are incapacitated and serve as Executors/Successor Trustees of your estate.
3. Choose 2-3 people to act as Guardians of any minor children. .
4. How and to whom do you wish your estate divided. Do not consider small personal items such as jewelry, furniture, etc. Focus on percentages.
5. If your beneficiaries pre-decease you, who are the next beneficiaries?
6. Other considerations: Children with special needs; business ownership, LLC's, etc.

For some plans, adult children can fill most of the roles listed above.

Remember, your Will or Living Trust will require periodic reviews over the years to ensure your plan continues to meet your needs. Changes are likely to be made over the course of your lifetime.

On a separate page: List the full names, addresses and phone numbers of the people above.

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