

PLAN WITH THE END IN MIND

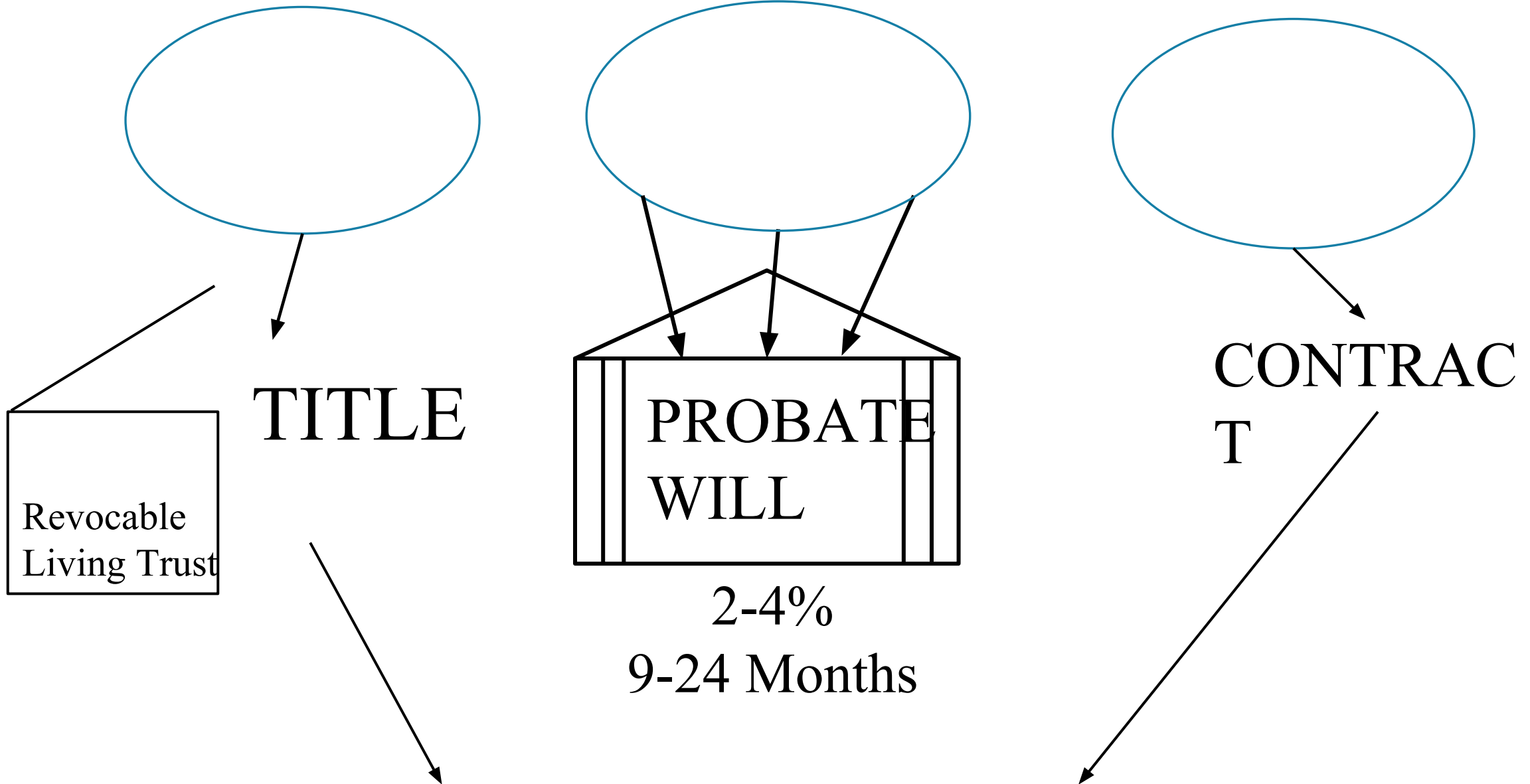
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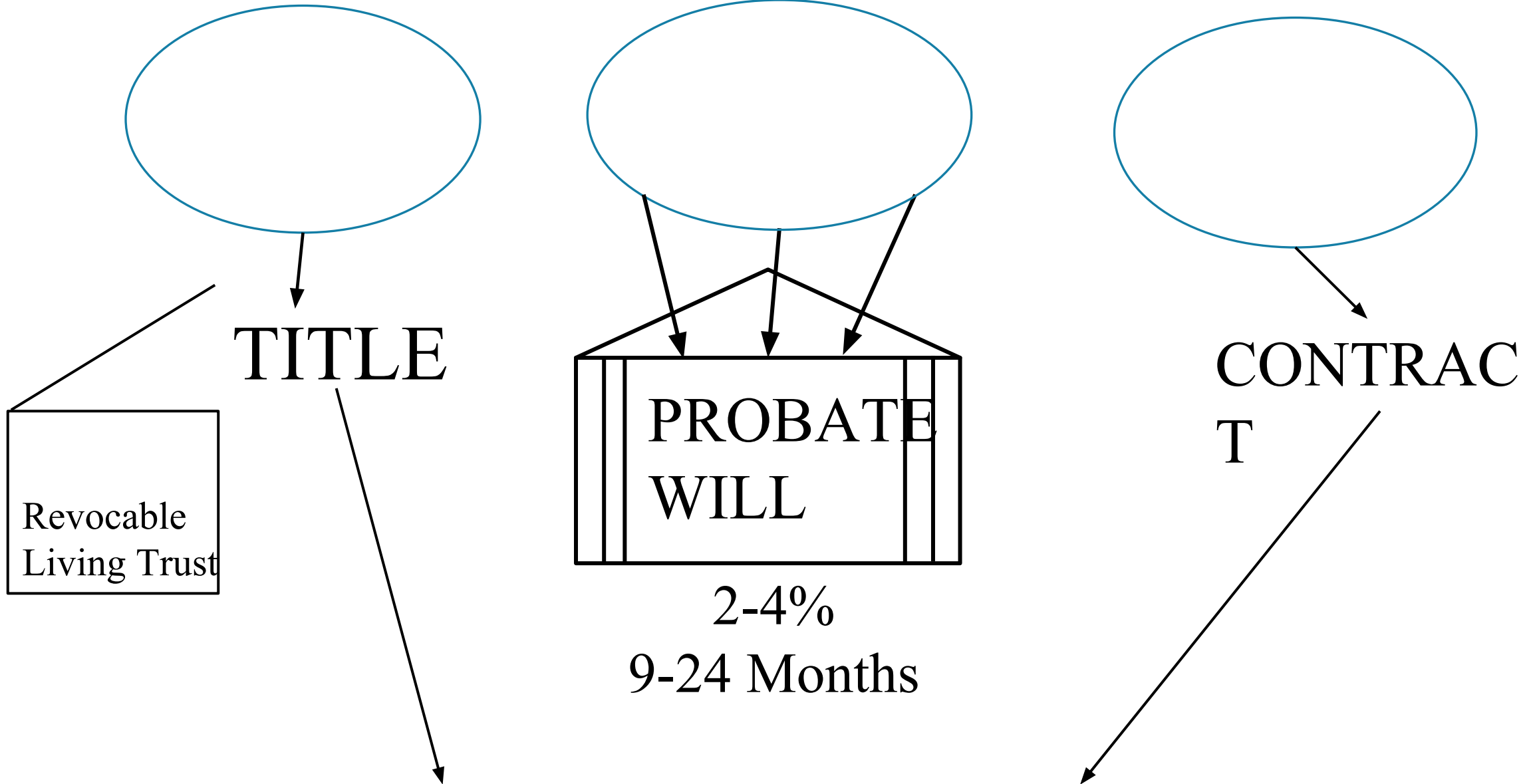
CHALLENGES TO OVERCOME WITH PREPARATION

1. What happens to the assets you have stewarded when you die?
2. Who will make decisions for you if you are alive but can't make decisions for yourself?

What would happen if I died now?



What do I want to happen?



YOUR FINANCIAL DECISIONMAKERS NEED TO KNOW:

You have a plan

They are on the list

Where is it and have
access to it

Your lawyer and
financial advisor

Where to find
organized list of
assets, passwords

(If Prudent)
Give the primary
decisionmaker a
“tour”

Generally, don't give
out copies of Will,
Trust, or Financial
Powers of Attorney.

YOUR MEDICAL DECISIONMAKERS SHOULD KNOW

- ❖ You have a plan and have copies on their phones
- ❖ They are on the list and what order
- ❖ Your wishes and the importance of Catholic teaching
- ❖ A trusted source of advice on Catholic teaching in medical situations. National Catholic Bioethics Center.
- ❖ Your lawyer, doctor(s), and major medical history

TOOLS FOR WRITING YOUR FINAL CHAPTER WELL

	Your Family with No Plan	Your Family With a Plan
Financial Incapacity	No authority or Guardian chosen by the Court	Financial Power of Attorney Incapacity Trustee
Medical Incapacity	Statutory order without priority or guardianship	Advance Directive Medical Power of Attorney
End of Life Treatment	No guidance	Advance Directive or Living Will set guidelines for Catholic Treatment
Beneficiaries After Death	Maryland's Statues	Inheritance by Will, Trust, Beneficiary Designations, POD, and/or Title all cohesive
Who Administers After Death?	Maryland Statutory PR Classes	PR designated in the Will Trustee Designated in the Trust

PLANNING BENEFITS

Be a Catholic witness of good stewardship

Clear chain of command

Determine who receives what, when, and how

Avoid unexpected swings of assets

Family harmony

Graceful transitions of authority

Handle special situations/beneficiary needs

Manage if things don't go according to plan

Get it off your list!

