

List of Estate Planning that Everyone Needs

When Using a Revocable (Living) Trust

- Adequate access to attorneys and/or paralegals to answer all questions during the estate planning process
- Revocable Trust or Joint Revocable Trust
- Memorandum of Trust
- Pour-Over Will
- Durable Power of Attorney for Financial Decisions
- Durable Power of Attorney for Health Care
- Oklahoma Advance Directive for Health Care
- Transfer Deed(s), as needed
- Full Asset Analysis for Correct Titling to the Trust
- An easy way to remember your Trust name (like a laminated wallet size card with the Trust name)
- Execution conference with two witnesses and a notary
- Continued access to your attorney and/or paralegals after the date of your execution conference to answer any questions about the funding your Trust (transferring your assets into your Trust.)

List of Estate Planning that Everyone Needs

When Using a Will

- Adequate access to attorneys and/or paralegals to answer all of your questions during your estate planning process
- Will
- Durable Power of Attorney for Financial Decisions
- Durable Power of Attorney for Health Care
- Oklahoma Advance Directive for Health Care
- Deed(s), as needed
- Full Asset Analysis for Correct Titling to Meet Client Goals
- Estate Funding Plan Memorandum or some sort of titling guidance tailored to the types of assets you have
- Execution conference with two witnesses and a notary
- Continued access to your attorney and/or paralegals after the date of your execution conference to answer any questions about the retitling your assets and filling in your beneficiary designations