

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.)

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Will

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