

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