# *Estate Planning Documents*

## *Avoiding Probate and General Trust Administration*

**DPA**
Property & Finances

**DPA**
*Advanced Health Care*

Springing or Effective Immediately

**Pour Over Will**

Guardianship

Funding Confirmation

### *Revocable Living Trust*

***(Optional)***

***Survivor's Support Trust***

***Tax Bypass Trust***

**Optional Disclaimer Trust**

### *Irrevocable Disclaimer Bypass Trust*

***(Optional or Mandatory pursuant Terms of Trust)***

Created upon the election of the Surviving Settlor:

- Asset Protection
- Survivor's Support and Maintenance.
- Estate, Income, Tax Planning
- Possible Costs: PAID
  1. Inventory
  2. Appraisal
  3. 706 Tax return
  4. 1041 & 541 Annual Income Tax return

### *Revocable Survivor's Trust*

- Revocable until Settlors's Death.
- Trust Administration instructions.
- Trust becomes Irrevocable at Settlor's death.
- Successor Administers the trust.

ADMINISTRATIVE TRUST
***GENERAL FIDUCIARLY CHECK LIST SUCCESSOR TRUSTEES AND EXECUTORS (add link)***

### *Separate Share or Sprinkling Support Trust For Children or Grandchildren*

***Used for: Health Education & Maintenance Support of Beneficiaries until a specific age (18, 25, 35 etc.)***