

Conference on Aging

Estate Planning: Strategies for Passing Along Your Assets

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FAQs:

Why do I need EP docs?

Do I need a POA even though I am married?

When should my POA be effective?

Who makes health care decisions for me if I cannot make them?

Why should I worry about health care advance directives?

What are my basic estate planning options?

TOD plan/Trust/Will

Should I transfer my house to my children during my lifetime?

Should I give away my assets now for asset protection purposes?

Does my Will or Trust control my retirement accounts when I die?

Will my beneficiaries be taxed after I die?

Is there a way to try to avoid fighting among my beneficiaries after I die?

Resources for finding estate planning attorneys/general information:

Local bar associations - resource to find attorneys, in Monroe County, IN

<https://monroecountybar.org/>

State bar associations - in IN, <https://www.inbar.org/search/Default.asp>

NAELA (National Academy of Elder Law Attorneys) - <https://www.naela.org/>

ABA (American Bar Association) Estate Planning Resource Overview –

<https://www.americanbar.org/>

CELA (Certified Elder Law Attorney) - <https://nelf.org/>

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