



Heritage Law*

Heritage Law Basic Estate Planning Package

Fees:

Single: \$2,000.00

Couple: \$2,200.00

Documents:

Power of Attorney, Representation Agreement, simple Will, and Heritage Law Estate Organization Guide

Basic Estate Planning:

There are three documents everyone should have:

1. A Power of Attorney
2. A Representation Agreement
3. A Simple Will

A **Power of Attorney** is a legal document where you can appoint someone (the attorney) to manage your financial and legal affairs in the event you were unable to do so yourself, for example due to illness, injury or travel. An **Enduring Power of Attorney** remains valid even if the person giving it loses mental capacity. It must be signed before the person loses capacity.

A **Representation Agreement** (which is a combined advance health care directive, personal directive and living will) allows you to designate someone you trust to make health and personal care decisions for you should you not be able to make such decisions yourself. If you have any particular health care wishes, you can include them in a Representation Agreement.

A **Will** sets out who you would like to administer your estate, to receive your assets and to be the guardians of your minor children in the event you died. This allows the maker of the will to make these decisions themselves rather than default to the legislative provisions that apply when a person dies without a will.

Additional Documents:

The **Heritage Law Estate Organization Guide** is a central document to organize key personal information and property information. The guide will be of great assistance to

your personal representatives and family members in managing your financial affairs, if that becomes necessary, and administering your estate.

- * Additional planning options may be appropriate, including trusts for minors, provisions for disabled beneficiaries, tax-reducing trusts, beneficiary designations and joint tenancies. After the initial interview, the lawyer will advise if additional strategies are recommended and additional fees may apply.