

## J2 Estate Planning Questions

### 1. Power of Attorney

- 1.1. What state will this Power of Attorney be originated in and recognized?
- 1.2. Who is the originating Principal (Grantor) of this Power of Attorney?
- 1.3. Principal / Grantor Address, Phone Number, Email.
- 1.4. Who is the Agent(s) / Attorney(s)-in-Fact
- 1.5. Agent(s) / Attorney(s)-in-Fact Address:
- 1.6. If multiple Attorney's-in-Fact, should they agree on decisions or can they act independently? (*Independently assumes each Attorney-in-Fact is assigned specific tasks with no overlap*)
- 1.7. Do you wish to grant your Agent(s) / Attorney(s)-in-Fact General Authority? (yes/no) (*General Authority grants the agent broad authority to act on behalf of the principal.*)
- 1.8. If not General Authority, what restrictions do you wish to put on your Attorney-in-fact?
- 1.9. My Attorney-in-Fact can co-own assets with me. ( yes / no ) (*Do you share accounts or property with your Attorney(s)-in-Fact*)
- 1.10. My Attorney-in-fact can benefit from control of my assets. ( yes / no ) (*If you share accounts this makes sense.*)
- 1.11. My Attorney-in-fact can delegate any granted authority. ( yes / no ) (*Authorizing the hiring of a third party to manage investments or property or submit taxes*)
- 1.12. I nominate my Attorney-in-fact to act as guardian or conservator for me. ( yes / no )
- 1.13. My Attorney-in-fact is required to prepare financial statements. ( yes / no ) (*It is unique for financial statements but not unheard of.*)

### 2. Health Care Directive

- 2.1. Who are you appointing as your Health Care Agent?
- 2.2. Select the level of care you prefer: (*Artificial Life Support / Artificial Food and Water / Comfort Care*)

### 3. Revocable Trust and Last Will & Testament

- 3.1. List Full Name, City, State for Successor Trustee(s) to manage Trust
- 3.2. Do you have a spouse ( yes / no )
- 3.3. Will your spouse inherit all the assets in the trust ( yes / no )
- 3.4. List Beneficiaries: Full Names, City, State
- 3.5. Do you want to name any alternate beneficiaries in case a beneficiary refuses the inheritance or passes away without an heir? ( Full Name, City State ) (*If you do not identify an alternate, the remaining inheritance will be divided evenly to the remaining beneficiaries.*)
- 3.6. What assets do you plan to transfer into the Living Trust? ( Real Estate / Financials / Personal Property / Other )

3.7. How do you want to divide the assets between the beneficiaries? ( equally or use percentages )

3.8 If Percentages, list name and percentage.

3.9. Do you want your funeral costs and other final expenses to be paid out of the Living Trust? ( yes / no )

After Reviewing these questions please select the link on the J2 Trust webpage and respond to the questions. When complete, press submit. Draft documents will be forwarded to you in two business days.