

Art's Charts

This name comes from my Law School days. I made charts of all my classes to better remember issues and law. My fellow students called them "Arts Charts"

PAULY LAW OFFICES, INC.

IF YOU DON'T HAVE A PLAN FOR YOUR ESTATE, THE STATE DOES.

IF UPDATING YOUR CURRENT ESTATE PLAN OR GETTING IT FINALLY DONE WAS YOUR GOAL FOR 2016 AND IT DID NOT GET DONE, THE TIME IS NOW.

SPECIAL POINTS OF INTEREST:

- My web site:
www.paulylaw.com
- My email
artpauly@paulylaw.com
- My phone
916-207-7526



INSIDE THIS ISSUE:

FEP's Something Fun. Friends and Family	1
Is your Estate Planning all it should be or could be?.	2
My card	

"FEP's" or Frequently Encountered Problems.

I often get the question, "How often should my Estate Plan be reviewed?" It's an interesting question because there is no hard and fast rule. I suggest every five years you should get it out and ask: Has there been any major changes in my life? Have any Family problems come up? Any new additions to the Family? Kids have gotten older? Have I acquired any additional assets? Have I re-financed any property? Are the Successor Trustees I selected still available and still who I want to have in charge? Mostly, ask "does the plan still fulfill my wants, wishes and aspirations for my Family and Estate?"

If any of those raise any concerns, it's time to update.

Something Fun



OK, can anyone tell me what ship this is? Where is it? And what was it famous for? Send me an email with your thoughts. No prizes, just for fun.
artpauly@paulylaw.com

DO YOU HAVE A FRIEND OR FAMILY MEMBER WHO HAS NOT DONE ANY ESTATE PLANNING?

ONE OF THE BEST COMPLIMENTS I GET ARE REFERRALS. I TREAT THEM WITH THE SAME RESPECT AND ATTENTION TO THEIR NEEDS AS I DO WITH ALL MY CLI-

ENTS.
MY PROMISE TO YOU IS THEY WILL THANK YOU FOR SENDING THEM TO ME.

Art's Charts

This name comes from my Law School days. I made charts of all my classes to better remember issues and law. My fellow students called them "Arts Charts"

PAULY LAW OFFICES, INC.

IF YOU DON'T HAVE A PLAN FOR YOUR ESTATE, THE STATE DOES.

Is your Estate Planning all it should be, or could be?

SPECIAL POINTS OF INTEREST:

- My web site:

www.paulylaw.com

- My email
artpauly@paulylaw.com
- My phone
916-207-7526

- * Was your Estate Plan done by a qualified Estate Planning Attorney ?
- * Does your Estate Plan reflect your goals -- or did you buy some one else's form ?
- * Can you read and understand your Estate Plan ?
- * Do you know what your Estate Plan does when certain events occur ?
- * Do you have more questions than answers ?

A Proper Estate Plan

A proper estate plan should include the following documents:

The Revocable Living Trust
 Certificate of Trust
 Durable Special Power of Attorney for Financial Matters
 Advance Directive for Health Care Decisions
 HIPPA Authorization
 Community Property Agreement
 Certificate of Trust
 Pour-Over Will
 General Transfer Agreement
 Proper Funding Documents. A schedule in a trust is not enough.
 Deeds
 Transfer letters

These documents are essential to any Estate plan. Missing documents create additional costs to your family.

WHAT CAN I DO ?

Ask yourself this question:

If something were to happen to me and I could look back at my estate, what would I want to see ?

Does your Estate Plan accomplish that vision?

If not or if you're not sure, we can help.

Give me a call. *Or visit my Web Site at : www.paulylaw.com*

MY CARD

