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Formulating a plan requires some thought is given to the following:

- (i) Who will serve as trustee (similar to an executor) who will have control over your property after your passing (list three to four different names in the order of priority that you want them to serve and please include addresses and phone numbers);
- (ii) Who will have the power to make health care decisions on your behalf when both you and your spouse cannot do it for yourselves (two names with addresses and phone numbers);
- (iii) Who will have the power to make asset management decisions on your behalf when both you and your spouse cannot do it for yourselves (two names with addresses and phone numbers);
- (iv) When do you want the principal portion of your estate distributed to your children assuming you are both deceased, e.g., 1/3 at age 25, 1/3 at age 30, and the balance at age 35?
- (v) Who will serve as guardian with authority to raise any minor children (list three to four different names in the order of priority that you want them to serve and please include addresses and phone numbers). If you name two people as co-guardians, then please address who will serve as guardian if the co-guardians divorce or one of them dies.

I also need a copy of your deed of trust for your home as well as a copy of your latest property tax bill on the home; please provide me with the same documents for any other real property in California in which you have an interest so that all of it can be transferred to the living trust.

To complete the transfer of all of your property to the living trust and thereby avoid probate, your interests in a business would have to be included; I would like to see any documentation you have evidencing ownership (such as stock certificates if you or your spouse are incorporated or partnership agreements).

This information is a good beginning.