



## Design Meeting Questionnaire

Thank you for choosing the Nebres Law Firm to serve you in your need to create an estate plan for you and your family. During your next meeting, the Design Meeting, you will meet with Karlo for approximately one to two hours (depending on your particular situation), to design your customized estate plan. **In order to prepare for the Design Meeting** and make it meaningful, below is a list of issues for you to answer or be prepared to answer at our upcoming meeting. It is okay if you do not completely understand a question. It would be explained in more detail at the Design Meeting. The purpose of this questionnaire is to get you and your spouse to begin thinking of these important issues before our meeting. Some couples prefer to fill this out separately and discuss their answers later. Some like to answer it together. Do what feels more comfortable. Eventually we will discuss these issues together.

1. **If you become unable to control your assets, or if you die, who would you want to assume the responsibility of managing and distributing your assets?** Typically, we recommend two people be named and one alternate. Your spouse can be included as an option.

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2. **What would you like to name your trust?** These trusts are personal to you and, like a corporation, they can be named in any manner you so direct.

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3. **Who are the beneficiaries?** Children? Others?

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4. **When would you consider yourself disabled?** During the design session, we will create your own instructions regarding your disability. For example, you can name a panel of people consisting of no less than three and no more than five individuals who, together, would make this decision. Please consider who you would name to make this determination.

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5. **If you fell ill, do you want to remain home? Under what circumstances would you permit nursing-home care?**

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6. **If you had to go into a health-care facility, what parameters do you wish to be followed?** Do you want to go outside? What kinds of foods do you like and dislike? What are your hobbies? What do you like to read? Do you want to go out in public? If so, where? Do you want to be dressed and groomed daily? Consider any other specifics that would enhance your “quality of life” if you had to be cared for.

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**7. Who would you authorize to make legal decisions on your behalf if you are unable to do so yourself? Who would be an alternate? What are their addresses and phone numbers?**

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**8. Who would you like to make your health-care decisions? (Decide whether or not to “pull the plug.”) Who would be the alternate? What are their addresses and phone numbers?**

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**9. Are there any specific bequests you want to make when you die? (i.e., my diamond ring, my grandmother’s china, etc., to my ... )**

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**10. Do you want your assets to be protected after your death from your spouse’s nursing home costs, if needed?**

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11. **Do you want to protect your assets after your death if your spouse remarries?** (“I don’t care what he does with his half, but my half is going to the kids!”)

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12. **Do you want your children to receive an “open box” (available to the creditors, predators and divorce) or a “closed box” (available to them, but no one else for the balance of their lives)?**

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13. **Upon your children’s deaths, do you want to require them to distribute the remaining assets to family? Anyone?**

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14. **Do you want to place any restrictions on your children’s access?**

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15. **How old will grandchildren have to be to receive or be in control of their money?**

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16. **Do you want to donate to any charities?**

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- 17. If all of your intended beneficiaries were unable to receive your bequest (because of death or other), who would you want to ultimately receive all of your assets?**
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These are but a few of the issues Karlo will be covering with you. You may ask any additional questions or raise any additional issues you feel are relevant to your estate plan. We look forward to seeing you at your Design Meeting.