

AVOIDING PROBATE

Your “assets” are anything with a “title” such as a safety deposit box, bank or investment account, vehicle, etc. The probate process serves the vital purpose of ensuring that your estate is properly distributed to your creditors and beneficiaries.

This process may be slow and costly; you may arrange your affairs so your loved ones may receive assets from your estate more efficiently.

Following are some methods to avoid probate:

- Joint Ownership with Rights of Survivorship (JTWROS)
- Designating Beneficiaries
- “Transfer” or “Payable” On Death
- Revocable Living Trust



It’s time to consider ADDING VALUE to your life if you or a love one are:

- newly married
- expecting a child
- newly divorced or widowed
- turning 18 years old
- buying a home
- retiring
- updating your financial plan
- dealing with special concerns
- considering Medicaid or Veteran Benefits
- helping your parents plan ahead

If you are considering future issues of Medicaid, Veteran, or Social Security Benefits; Asset Protection or Trust Planning,

these Personalized Estate Documents create your solid base:

- **Will** allows you to specify what will be done with your property and names your estate executor. It can also name guardians for your minor children.
- **Living Will** contains your decisions regarding life-sustaining medical treatment and provides your healthcare power of attorney with guidelines on which to act.
- **Healthcare Power of Attorney** is the individual who will make medical treatment on your behalf when you are no longer able to do so.
- **Financial Power of Attorney** names an individual to make financial decisions on your behalf.
- **HIPAA** authorizes individual(s) access to your medical information.

When planning for your future, consider:

Who will care for you and where?

- Home health care providers
- Adult day care centers
- Assisted living facilities



Albert G. Hehr, Jr., ESQ.
Coach/Estate and Long-term Care Issues

\$350 Personalized Estate Plan



Help us **ADD VALUE** to all the stage of your life!

- Securing your future while you’re **alive**.
- Ensuring quality care if you become **disabled**.
- Benefiting your loved ones at the time of your **death**.

Compliments of:

Albert G. Hehr, Jr., ESQ.

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PERSONAL INFORMATION

Name: _____

Address: _____

Date of birth: _____

Phone: () _____

Email: _____

Date of Marriage: _____

Name of Spouse: _____

Spouse date of birth: _____

BENEFICIARY INFORMATION

Name: _____

Relationship: _____

Whole percentage to receive: _____ %

Name: _____

Relationship: _____

Whole percentage to receive: _____ %

Name: _____

Relationship: _____

Whole percentage to receive: _____ %

FINANCIAL POWER OF ATTORNEY:

CHECK IF SAME AS EXECUTOR

Name: _____

Relationship: _____

Phone: () _____

Address: _____

Alternate Name: _____

Phone: () _____

Address: _____

WILL PLANNING INFORMATION

Executor Name: _____

Phone: () _____

Address: _____

Successor Name: _____

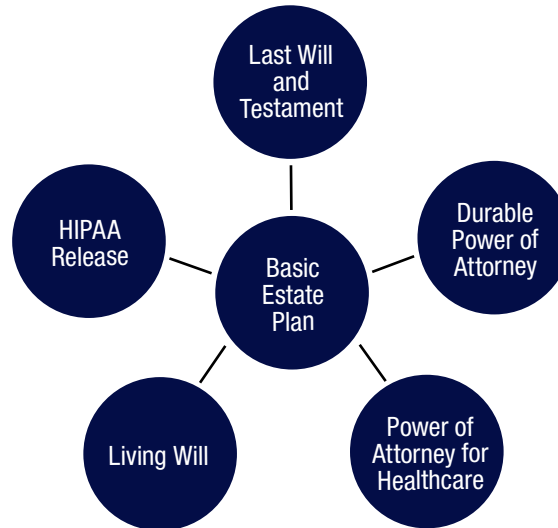
Phone: () _____

Address: _____

Successor Name: _____

Phone: () _____

Address: _____



HEALTHCARE POWER OF ATTORNEY:

CHECK IF SAME AS EXECUTOR

Name: _____

Relationship: _____

Phone: () _____

Address: _____

Alternate Name: _____

Phone: () _____

Address: _____

**Please detail on a separate sheet if there are any special gifts intended and/or Guardians for minor children.
AS A VALUED CLIENT, MINOR CHANGES CAN BE MADE FOR ONE YEAR AT NO ADDITIONAL CHARGE.**