



Top 10 Estate Planning Tips

Simple steps to protect your family, your wishes, and your future.



INTRODUCTION

A Simple Plan Makes Everything Easier...

Most people know they should have a plan.

They just don't know where to start.

This guide walks you through the essentials,
in plain English.

Our goal:

Help you make clear decisions now
so your family isn't left guessing later.





START HERE

CREATE A DURABLE POWER OF ATTORNEY

Who handles your finances if you can't?

If you're unable to act, someone needs legal authority to step in.

Without it, your family may have to go to court.

That's expensive and stressful.

Do this:

- Choose someone you trust
- Decide when their authority begins

Bottom line:
This document helps your family avoid court.

UNDERSTAND IF YOU NEED A TRUST

Identify if you need a trust. The truth is you might need one, but it's not always necessary.

While many people are told they need a trust.

That's not always true in Texas.

A well-written Will often:

- Costs less
- Works just as well
- Keeps things simple

Bottom line:
Start simple. Add complexity only if needed.

USE THE RIGHT FORMS

Not all documents are treated the same.

Banks and government agencies may require their own forms.

Do this:

- Check with institutions ahead of time
- Share documents while you're healthy

Bottom line:
Don't wait for a crisis.



NEXT STEPS

CREATE A MEDICAL POWER OF ATTORNEY

Who speaks for you medically?

If you can't make decisions, someone must.

Do this:

- Choose a trusted person
- Make your wishes clear

Bottom line:

Pick someone who will advocate for you.

ESTABLISH A LIVING WILL

What care do you want at the end of life?

Doctors often look to family for direction.

If your wishes aren't clear, decisions get harder.

Do this:

- Put it in writing
- Talk to your family

Bottom line:

Clarity now prevents conflict later.

ESTABLISH A MENTAL HEALTH DIRECTIVE

Plan ahead for mental health care.

This allows you to:

- Accept care you want
- Refuse care you don't

Bottom line:

You stay in control.



LAST STEPS

DO NOT RESUSCITATE (DNR)

For serious medical situations

This tells emergency responders what to do. Important:

It must be properly completed and applies in specific cases.

*Bottom line:
Make your wishes clear
and legal.*

FUNERAL INSTRUCTIONS

Don't leave your family guessing.

You can:

- Choose burial or cremation
- Share specific requests
- Prepay if desired

*Bottom line:
Give your family peace of
mind.*

DO YOU NEED A WILL?

Yes—most people do. Even if you don't have much, you still have assets.

Without a Will, the state decides who gets them.

While online wills seem easy, they're often written for everyone—not for you.

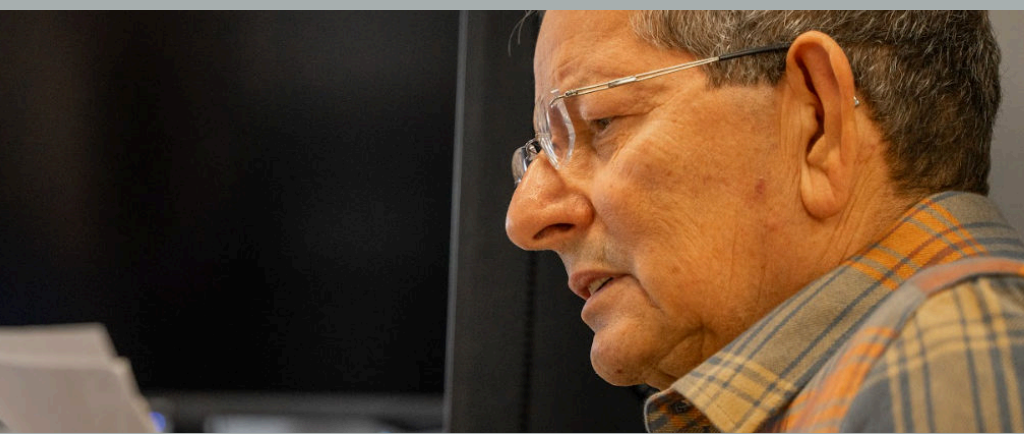
They don't account for:

- Texas-specific laws
- Your exact family situation
- What actually happens in probate

A small mistake can lead to:

- Delays
- Extra costs
- Family conflict

*Bottom line:
A (good) Will puts you in
control.*



REMEMBER

KEEP EVERYTHING ORGANIZED

A plan only works if it's accessible.

Do this:

- Store documents safely
- Tell someone where they are
- Keep a list of accounts and assets

Bottom line:

Organization is part of the plan

DON'T LEAVE THIS TO CHANCE

A clear plan protects your:

- Family
- Finances
- Final wishes

This guide is a starting point, not legal advice.

TALK TO A TEXAS PROBATE ATTORNEY TODAY

At Texas Probate Attorney, we help families:

- Create clear, simple plans
- Avoid costly mistakes
- Move forward with confidence

Schedule your consultation today. (844) 878- 0700



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