

Attorney Meeting Preparation

Do the thinking before the meter starts

Educational planning resource - not legal, tax, financial, or medical advice. Laws and terminology vary by state. Use this guide to organize your thinking and bring informed questions to qualified professionals.

1. Goals

What are the three most important outcomes I want from this plan?

Is preserving an inheritance important, secondary, or not a goal?

How important are simplicity, privacy, probate avoidance, tax planning, asset protection, or long-term-care planning?

2. Family & beneficiaries

Who should inherit? In what proportions?

What should happen if a beneficiary dies before me?

Should young beneficiaries receive assets outright or in trust?

Are there family circumstances the attorney should know about?

3. Fiduciaries

Who should serve as executor?

Who should hold financial Power of Attorney?

Who should serve as health care agent?

Who should serve as alternates?

Should any role be handled by a professional instead of family?

4. Incapacity

When should financial authority begin?

What decisions should be limited during temporary incapacity?

Who can coordinate locally if decision-makers live far away?

What professional help should an agent be allowed to hire?

5. Medical preferences

What does an acceptable quality of life mean to me?

Do I want time-limited trials of treatment with reassessment?

When would I prefer comfort-focused care?

How much discretion should my health care agent have for new treatments that did not exist when I signed the directive?

6. Housing & long-term care

Do I want to age in place?

When would a move become acceptable or necessary?

Should I consider long-term-care or Medicaid planning?

Would a trust improve my own flexibility/care or mainly preserve assets for heirs?

7. Non-probate assets

Which assets pass by beneficiary designation or joint ownership?

Are beneficiary designations current and coordinated with the will?

Are there accounts that should be retitled or simplified?

8. Business / professional interests

What happens if I cannot operate my business for 30, 60, or 180 days?

Who has authority to continue, sell, or wind it down?

Are credentials, client records, contracts, and billing processes documented?

9. Digital & creative assets

Who can access devices, email, cloud storage, password manager and digital accounts?

What should be preserved, transferred, memorialized, or deleted?

Do copyrights, royalties, publishing, licensing, domains, or creative archives require special treatment?

10. Questions requiring legal judgment

Which existing documents need replacement rather than amendment?

What state-specific execution formalities matter?

What tax, trust, Medicaid, housing, business, or IP issues require specialized advice?

What have I not asked that the attorney thinks I should?
