



**THE LAW OFFICES  
OF  
TIMOTHY A. PUPACH**

**ESTATE PLANNING  
AND PROTECTING  
YOUR ASSETS FOR  
THE FUTURE**



**WHO NEEDS ESTATE PLANNING?**

Everyone - whether your estate is large or small. Either way, you should designate someone to manage your assets and make health care and personal care decisions for you if you ever become unable to do so for yourself.

If your assets are not in a living trust when you die, they would be subject to Probate. Probate is a court-supervised process for transferring assets to the beneficiaries listed in one's will or, if no will exists, according to intestate laws.

If you fail to plan ahead, a judge will simply appoint someone to handle your assets and personal care. And your assets will be distributed to your heirs according to California intestate succession law. An estate plan gives you much greater control over who will inherit your assets after your death.

The cost of probate is usually greater than the cost of managing and distributing comparable assets in a living trust. Probate will likely take more time to complete than the distribution of property held in a living trust. In addition, assets tied up in probate may not be as readily accessible to your beneficiaries as those held in a trust.

Estate planning can establish protection for your assets, help you avoid court supervised probate, and address your future needs in case you ever become unable to care for yourself.

**OUR ESTATE PLANNING SERVICES**

For a flat fee, our attorneys will guide you through the estate planning process, prepare all necessary documents, and record documents with the corresponding State and County agencies.

We will provide you with an Estate Planning Questionnaire that allows you to take a good look at all your assets, gather the necessary information, make decisions as to the management of your estate, and name your beneficiaries, trustees, executors, agents, etc.



The estate planning documents our office will prepare for you (depending on your needs) as part of your estate planning package include:

- ~ A Revocable Living Trust
- ~ A Certification of Trust
- ~ Last Will and Testament
- ~ Power of Attorney for Finances
- ~ Health Care Directive
- ~ Trust Transfer Deeds
- ~ Preliminary Change of Ownership Reports

Once all documents have been executed and notarized, we provide you with a portfolio to keep these important documents in one place.

*We provide any or all of these documents as needed in your Estate Plan. Establishing an Estate Plan is the first step to ensuring your assets will be managed according to your wishes.  
Please call for a consultation.*