TARLETON LAW FIRM

CLIENT REFERENCE

What Situations Do Your Documents Cover?

A snapshot of the most common estate planning documents, and when each one takes effect.

WHY PLAN NOW · You cannot sign legal documents without the **legal capacity** to do so. Your plan should name **alternate agents** and build in flexibility for the unexpected.

1

STAGE ONE · HEALTHY *Plan while you can*

HIPAA Authorization

Lets your named agents access medical records that would otherwise be private under federal law.

2

STAGE TWO · EMERGENCY *To decline resuscitation*

Out-of-Hospital Do Not Resuscitate (DNR)

Instructs emergency personnel to forgo resuscitation. Does not affect other emergency or comfort care. We can advise how to complete it.

3

STAGE THREE · TERMINAL ILLNESS *End-of-life wishes*

Directive to Physicians ("Living Will")

Communicates whether to provide or withhold life-support treatment if you are terminally or irreversibly ill and unable to speak for yourself.

4

STAGE FOUR · INCAPACITY *When you cannot decide*

Medical Power of Attorney

Names an agent to make health care decisions in line with your wishes when you no longer can.

Statutory Durable POA

Empowers an agent to act on your property. Not for medical decisions; may pair with a Revocable Management Trust.

5

STAGE FIVE · TRANSFER & MANAGE *Assets pass to beneficiaries*

Will & Revocable Management Trust (if used)

A Will directs who receives assets held in your individual name and names your executor. Pairing it with a trust can add management, creditor and divorce protection, and tax benefits, especially for minors.

UPON DEATH · Incapacity documents cease to be effective and are superseded by your Will.

FOR PARENTS · MINOR GUARDIANSHIP

Declaration of Minor Guardian

Expresses who should (and should not) care for your minor children upon your incapacity or death.

ALSO AVAILABLE

Supplemental Documents

Anatomical Gifts · Burial Power of Attorney · Declaration of Guardian for Oneself.

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