

Meurer Law Offices, P.C.

Agent Nomination Form

Name: _____

A key component of estate planning are the agents who serve in certain capacities and carry out duties on your behalf if you become disabled or when you die. This form is a way for you to share with us the names of the people you wish to name as agents in your estate plan.

Revocable Living Trust

Trustee and Successor Trustees

Trustees are the managers of your living trust. They help to manage your personal and financial affairs if you become disabled, and administer your trust after your death, settling your estate and distributing your assets under the terms of your trust. Trustees can be either an individual or a corporation, depending upon your preferences.

Name	Relationship	Address
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Initial: _____
Successor: _____
Successor: _____
Successor: _____

Trust Protector and Successor Trust Protectors

The function of the Trust Protector is to assist, if needed, in protecting the interests of your beneficiaries and in achieving your objectives as outlined by your trust agreement. A Trust Protector should be your CPA, Attorney or a Corporate Fiduciary.

Name	Relationship	Address
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Initial: _____
Successor: _____
Successor: _____
Successor: _____

Last Will and Testament

Personal Representative and Successor Personal Representatives

A Personal Representative is one who settles your estate if your Will has to be probated. This can be a spouse, trusted friend, family member, corporate fiduciary or bank.

Name	Relationship	Address
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Initial: _____
Successor: _____
Successor: _____
Successor: _____

General Durable Power of Attorney

Financial Agent or Attorney-in-Fact

A financial agent or Attorney-in-fact is one who handles your personal financial affairs once you become incapacitated.

Name	Relationship	Address
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Initial: _____
Successor: _____
Successor: _____
Successor: _____

Do you wish to have this Durable Power of Attorney go into effect immediately or only if you become incapacitated? *Circle One* IMMEDIATELY UPON INCAPACITATION

Health Care Power of Attorney and Living Will

Healthcare Agents

A Health Care Agent is one who makes healthcare decisions for you if you are unable to do so. He or she is authorized to select physicians, determine medications and treatment, admit you into a hospital/nursing home, and if authorized, make life support decisions if you are terminally ill.

Name	Relationship	Address
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Initial: _____
Successor: _____
Successor: _____
Successor: _____

Do you wish to donate Organs?	YES	NO
Do you wish to donate Tissue?	YES	NO
Do you want to be used as a Cadaver?	YES	NO

If you are terminally ill and lapse into a coma, how many days do you wish to be kept on support?
Circle One 3 DAYS 7 DAYS Other: _____

Guardian for Minor Children

A Guardian's responsibility is to protect the interests of minor children and to ensure that their needs are met.

Name	Relationship	Address
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Initial: _____
Successor: _____
Successor: _____
Successor: _____