

COMPONENTS OF AN ESTATE PLAN

A standard ‘trust based’ estate plan typically involves creating documents for all three verticals (as applicable) that are mentioned in the [‘What is Estate Planning’](#) IndUS Guide.

Following is a brief overview of the documents that we typically create as part of our estate planning services for couples and individuals:

Vertical	Document Name	Purpose
Wills & Trust	Certification of Trust	Required for trust funding.
	Declaration of Trust or Trust Agreement	Creates your trust.
	Will or Pour Over Will	Distributes your non-trust assets after your death. Also, contains your funeral wishes and guardianship provisions.
	Assignment of Property	Transfers your tangible assets (i.e., personal property) to your trust.
	Funding Instructions	Provides a checklist and related instructions to guide you with funding your trust.
	Trust Transfer Deed	Transfers your real estate to your trust.
Guardianship	Guardianship Declaration	Appoints permanent and temporary guardians to take legal custody of your minor child(ren) in the event of parents’ death or incapacity. Also, contains conservatorship provisions.
Financial & Medical Authorizations	Financial Power of Attorney	Appoints agents to access your financial records and make your financial decisions if you are incapacitated.
	Advance Health Care Directive and Health Care Power of Attorney	Appoints agents to make your medical decisions if you are incapacitated and after your death.
	HIPAA Release & Authorization	Appoints agents to access your medical records if you are incapacitated and after your death.

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Vertical	Document Name	Purpose
Miscellaneous	Beneficiaries Details	Contains names, addresses, email addresses and phone numbers of your beneficiaries, i.e., those who will receive your assets after your death.
	Nominee Details	Contains names, addresses, email addresses and phone numbers of your nominees, i.e., those who will manage your estate plan.
	Personal Property Memorandum ¹	Transfers your tangible assets (i.e., personal property) to in any manner other as specified in the Declaration of Trust or Trust Agreement.

¹ To be used only if necessary in future. Otherwise, it remains blank.