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Estate Administration, Elder Law & Guardianships

Licensed in North Carolina and Florida

**1. Where are important papers kept?**

- \* Legal documents such as wills, powers of attorney, living trusts and deeds
- \* titles to automobiles, boats, houses and cemetery plots
- \* original stock certificates and bonds
- \* life and medical insurance policies
- \* funeral arrangements

**2. Who are important people who can help in emergencies?**

- \*family members or next of kin
- \* attorney
- \* clergy
- \* good friends and neighbors
- \* medical doctor
- \* bank officer, stockbroker and accountant

**3. Is there a safety deposit box?**

- \*name and location of bank (s)
- \*where are the keys/comboination?
- \*has an inventory of personal belongings and valuable assets been done?

**4. What role does technology play in your life?**

- \* who has access to your computer?
- \*are financial transactions conducted on-line?
- \* where are your passwords located?

Few decisions in life are as distasteful, yet as important, as planning for its end. Those who do such planning save their heirs much anguish and frustration and often a great deal of money.