

## BRIEF DESCRIPTION OF ESTATE PLANNING DOCUMENTS

NOTE: The summarizations contained in this brief description, are stated to help a person understand these types of documents. These descriptions should not be interpreted as a strict statement of the law. Please consult with your attorney.

### WILL

A Will is a document in which you state how you want your assets to be distributed upon your death, and who you want to administer your Estate. In Florida, we call the administrator of your Estate the Personal Representative. There are also additional provisions you can make in a Will, including, but not limited to: your request concerning cremation or burial, Nomination of Guardian for your Minor Children, and the handling or forgiveness of debts or obligations. A Will is administered through and under the supervision of the Probate Court.

### DESIGNATION OF HEALTH CARE SURROGATE

Should you become unable to make health care decisions for yourself, this document designates the individual you wish to make the decisions for you. Typically, the first choice is your spouse, if you are married. It is recommended that the alternate be an adult child, close family member and/or a close friend.

### DURABLE POWER OF ATTORNEY

This document is to appoint someone to make personal and business decisions for you, and it can be for your convenience or if you become incapacitated. Typically if you are married the first choice is your spouse. It is recommended that the alternate be an adult child, close family member and/or a close friend. **There were substantial changes in the Florida Power of Attorney Statute effective as of October 1, 2011.**

### LIVING WILL

A Living Will is a written declaration that you do not wish to be artificially maintained, if death is imminent or inevitable. This does not necessarily mean to withhold medication to ease the process.

### LIVING TRUST

A Living Trust has become a popular document to be used by either a single person or a married couple to minimize or avoid probate expenses and in the past to possibly reduce estate taxes. There have recently been some major changes in the Federal Estate Tax laws that impacts whether there is a need for or type of Living Trust you should have.

It is the recommendation of this attorney, that a single person or a married couple, should consider whether they want or need a Living Trust, depending on the type of assets they have and if their assets have a value greater than **\$75,000.00** dollars (excluding homestead real property, an automobile used as primary transportation and household furniture, furnishings and appliances valued up to \$20,000.00 dollars, and certain types of retirement investments with named beneficiaries and contingent beneficiaries).

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Thank you for your inquiry, in reference to myself and my law office. The following is a simplified summary of my background and relevant professional data.

**AREAS OF PRACTICE**  
(Concentration)

WILLS, TRUSTS, DURABLE POWERS OF ATTORNEY, DESIGNATION OF HEALTH CARE SURROGATES, LIVING WILLS, ESTATE PLANNING & ESTATE PLANNING DOCUMENTS, ESTATE PROCESSING/PROBATE, TRUST ADMINISTRATION

**AUTHORIZED COURTS**  
**(YEAR OF INDUCTION)**

All State of Florida Courts, 1979; Including Second District Court of Appeals and Supreme Court of Florida, 1979; United States of America, Middle District of Florida, 1979; United States of America, Court of Appeals for the Eleventh Circuit, 1985.

**EDUCATION**

Mercersburg Academy, Mercersburg, Pennsylvania, 1972; University of Florida, Gainesville, Florida, 1975; High Honors, B.S.B.A.; Phi Kappa Alpha Fraternity; Stetson University College of Law, St. Petersburg, Florida, 1978 J.D.; Sigma Nu Phi Fraternity (Legal).

**MEMBERSHIP**

Florida Bar- member of Real Property, Probate, and Trust Law section, Clearwater Bar Association - member of Real Property & Probate section, Secretary, Member of Board of Directors of Florida Lawyers Legal Insurance Company and Member of Board of Directors of Religious Community Services, Inc.(RCS).

**OFFICE INFORMATION**

Practiced law in Pinellas County and the State of Florida since 1979. Provided legal services for individuals and businesses in Pinellas County and as well throughout the State of Florida, and on occasion in a multi state or international capacity.