



Mendes Weed, LLP

## Estate Planning Guide

Thank you for taking the first step toward a secure future by reading this Estate Planning Guide. This guide is here to help you learn more about how Estate Planning works, and what kind of agreements and legal documents are involved. By downloading this guide and following the steps laid out, we can ensure that our initial meeting is more productive.

In this guide, I'll go over some of the common goals associated with estate planning and will also describe what we can do for you. That way, when we meet for a consultation, we will have a head start in talking about how to develop the perfect plan for your unique situation.



## About Christina Weed



With a family of my own, I understand how important it is to ensure that your loved ones are cared for. I enjoy taking an active role in my community in Danville, and working with my husband to build a secure future for our daughter.

As an attorney, I am dedicated to helping families prepare for the future and ensuring that no matter what happens, the interests you have fostered will remain secure and support your family and loved ones for years to come. I have experience with Estate Planning, Trust Setup, Trust Administration & Probate, Trustee Advising, and Trust Litigation. With this range of background experience, I can assess your needs from various angles, and provide long-term, informed solutions.

With an LL.M. in Taxation from the University of San Diego, and a Bachelor's Degree in Accountancy, I offer a unique combined focus on Trusts & Estates, Tax Law, and Business Law. I have been the Chair of the Tax Section of the Contra Costa Bar Association since 2013, and am also a member of the Estate Planning Council, Diablo Valley, and the Tri-Valley Estate Planning Council.

**Christina Weed**  
Attorney, LL.M. (Taxation)

## About Lisa Mendes



I advocate for the rights and well-being of my clients and that of their children and the elderly. I stay as a very fair negotiator and communicator with other lawyers and judges, which streamlines and expedites the process.

With a Master's Degree in Business Administration (MBA), and a Bachelor's Degree in Spanish Language and Literature, I am able to serve a large portion of the community. I have litigated multiple bench and jury trials in civil and criminal court. In addition, I also advocate for proposed legislation and new laws as a member of the Contra Costa County Delegation of the California Conference of Bar Associations.

**Lisa Mendes**  
Attorney

## Mendes Weed, LLP



# Common Estate Planning Goals

If you are reading this guide, you have already taken the first step toward setting up your estate plan: gathering information. People consider Estate Planning for a variety of reasons, and with goals defined by their unique needs. We are here to help you define the details regarding your goals, and to ensure that those goals are achieved through strategic planning.

Let's walk through some common goals people have when looking into estate planning. Some of your goals might appear below, and you might also generate new ideas by reflecting on this list.

- Provide Stability for Your Children and Heirs
- Provide for Your Spouse and Other Loved Ones
- Update an Existing Plan for Current Laws and Structure
- Manage Lifetime Retirement Income
- Avoid Getting Stuck in Probate Administration
- Facilitate Business Succession
- Get Ahead of Potential Health Complications
- Minimize Estate Taxes

Take a moment and think about the goals you might want to achieve with an estate plan. Get as specific as possible, and elaborate on the common goals above.

## Essential Elements of an Effective Estate Plan

In order to achieve your goals, we employ a wide range of legal measures. Each goal you seek to accomplish could be met with several legal strategies, and we know exactly how to find the best fit for you and your family's future.

Let's take a look at many of the key documents and agreements that, in concert, make up a well-rounded estate plan:

- **Will:** A will gives you the power to determine how your estate is administered and distributed after your death.
- **Living Trust:** A living trust sets out whom you will designate as a trustee, and describes how they will carry out the instructions indicated in your trust. With a strong trust plan, you can provide protections for your children, even if they are minors. It will also allow your loved ones to avoid the costs, monetary and otherwise, of court-monitored probate following your death.
- **Advance Healthcare Directive:** An Advanced Healthcare Directive allows you to designate a person to take charge of your healthcare and end-of-life decisions in the event that you are unable to make those decisions yourself.
- **Durable Powers of Attorney:** A Durable Power of Attorney allows you to appoint a loved one to make financial choices and pay bills in the event that you are no longer able to do so. They ensure that the best interests for you and your family are always followed.

- **Guardianship Documents:** Use Guardianship Documents to ensure that your children, if they are minors, are always in the best possible care. When prepared correctly, Guardianship Documents let you control every aspect of your child's care, not the court.

## Checklist of Items to Bring to Our Initial Meeting

- 3-6 months of financial statements
- Property deeds
- Any estate planning documents you already have
- Specific goals you would like to achieve with an estate plan
- An outline or plan for each document or agreement we will develop, as applicable:
  - Will
  - Living Trust
  - Advance Healthcare Directive
  - Durable Powers of Attorney
  - Guardianship Documents
- Names and addresses of any individuals to be included

## Build Your Estate Plan Now

Thank you again for taking the time to focus on you and your family's future. You are making the right decision choosing to consider a plan now.

Now that you have a clear overview of how a well-crafted estate plan works, let's get together and discuss how the Law Offices of Christina Weed can help. Bring this guide with you to our initial meeting to ensure we can use our time the most effectively to complete your plan.

**Set up a consultation today with Mendes Weed, LLP**  
**(925) 390-3222 or [www.mwlawca.com](http://www.mwlawca.com)**