



To prepare for our upcoming intake discussion, please consider the following points. You do not need to have these answers written out or prepared in advance. These are simply discussion points that we will walk through together during our discussion.

- What is your legal name and contact information?**
- What are the names of your children?**
- Who would you like to name as your trustees?**  
*(those who will manage the trust and carry out your wishes after you become deceased)*
- Who are your beneficiaries, and how should they receive their inheritance?**  
*(for example: outright or distributed at specific ages)*
  - Are there any specific gifts or unique distributions you would like to include in your trust?
- Who will be your power of attorney agents?**  
*(those who will manage your finances should you become incapacitated)*
- Who will be your health care agents?**  
*(those who would make medical decisions for you should you be unable to do so)*
  - If you are in a permanent vegetative state, do you want life support removed?
  - Are you an organ donor?
- If you have minor children, who do you want to name as their guardians?**