

Wolfe Law Offices, PLLC

P.O. Box 98085, Raleigh, NC 27624

Beth E. Wolfe
Attorney at Law

www.wolfelawnc.com
919-322-9823

Thank you for contacting me concerning your desire to obtain estate planning documents. This package of information is designed to explain several concepts associated with estate planning and to ensure the efficiency of the process with our office. The enclosed documents include:

- (1) Will Intake Sheet: This is an estate planning questionnaire which assists our office with the drafting of your documents. Please complete the questionnaire and send back to our office in advance of our first discussion by one of the following ways:
 - a. Complete this form online and submit the document electronically via the "Submit" button on the form
 - b. Complete this form online and save the file and email it to my office at beth.wolfe@wolfelawnc.com
 - c. Print and Complete the document and mail to my office at: Wolfe Law Offices, PLLC, PO Box 98085, Raleigh, NC 27615

IF YOU ARE A MARRIED COUPLE, EACH SPOUSE NEEDS TO COMPLETE A SEPARATE INTAKE SHEET.

- (2) The Basics of Estate Planning: This is designed to provide you with a brief explanation of the four documents that our firm will be drafting for you. Please familiarize yourself with these explanations and feel free to ask any questions concerning these documents during your consultation.
- (3) Estate Planning Timeline: This explains the procedure for handling a simple estate plan from beginning to end. It takes approximately 2 weeks from the day you call our office until the day you come to execute the documents. Please keep in mind that our workload is always a factor as well as the degree of completeness of your will intake sheet. Missing information will result in the delay of your receipt of these documents, and changes could add additional time. Our goal is to ensure the documents are correct and reflect your wishes, so we will take extra time if this is required to ensure you are satisfied.

Wolfe Law Offices, PLLC

P.O. Box 98085, Raleigh, NC 27624

Beth E. Wolfe
Attorney at Law

www.wolfelawnc.com
919-322-9823

THE BASICS OF ESTATE PLANNING

Last Will and Testament

A will accomplishes several important goals. First, a will enables you to transfer your assets to the people you want to receive them after your death. Second, a will allows you to designate a guardian for your minor children, if any. In the absence of a will designating a guardian, the Clerk of Superior Court will select one for you, unguided by your preference. Third, a will enables you to designate a custodian to manage the assets left to your minor children until they reach a responsible age. Fourth, a will may enable you to minimize federal taxes and other costs.

A Declaration of a Desire for a Natural Death

This document, commonly referred to as a "living will," directs the withholding or discontinuance of extraordinary means, such as CPR, a mechanical respirator, surgery, or artificial nutrition and hydration (unless they will used exclusively for comfort) if it is determined by physician that you are terminally and incurably ill or in a persistent vegetative state. In North Carolina, doctors are permitted to rely on this document as an indication of your desire not to be kept alive in the event you become terminal or incurable.

Statutory Short Form Power of Attorney (POA)

This document, (also referred to as a "Durable Power of Attorney" or "Financial Power of Attorney") permits one or more persons of your choosing to act on your behalf should you become incapacitated, whether physically or mentally, temporarily, or permanently. The person named is referred to as an "attorney-in-fact" and can deal with your real and personal property as well as perform numerous other tasks including banking, contracting, accessing your safe deposit box, handling tax matters, and gifting property for the benefit of your estate. These powers are automatically revoked upon your death.

Health Care Power of Attorney

This document permits you to designate an agent of your choosing to make health care decisions for you if an attending physician determines that you lack sufficient understanding or capacity to make or communicate your own health care decisions. This document is broader than the living will in that it applies to situations in which you are not necessarily experiencing a terminal or incurable condition but are unable to make health care decisions for yourself.

HIPAA Authorization for Release of Information

This document authorizes medical providers to disclose your health information to others named in the document. This document is entirely voluntary.

Wolfe Law Offices, PLLC

P.O. Box 98085, Raleigh, NC 27624

Beth E. Wolfe
Attorney at Law

www.wolfelawnc.com
919-322-9823

ESTATE PLANNING TIMELINE

GETTING STARTED

Client contacts offices to set up initial consultation and obtains initial estate planning questionnaire.

STEP 1 - QUESTIONNAIRE

Client reviews the information and thoroughly completes and returns the estate planning intake questionnaire

STEP 2 – INITIAL CONSULT

30 minute discussion to meet and review . intake and discuss requirements.

note: during this COVID-19 pandemic, these initial meetings will occur via phone or video conference.

STEP 3 – DRAFTS CREATED

Client receives drafts of Estate Planning Documents within two weeks.

STEP 4 – CLIENT REVIEW

Client reviews all documentation carefully. If there are corrections or changes to be made, they should be made over the phone or by email.

ESTATE PLANNING DOCUMENT EXECUTION

Client comes to our office to execute estate planning documents