



**BAYSTATE**  
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# THE FIVE BASIC ESTATE PLANNING DOCUMENTS

## **LAST WILL AND TESTAMENT**

- Allows you to control the disposition of your probate assets
- Allows you to appoint a personal representative of your estate – they will carry out the wishes expressed in your will
- Allows you to appoint a Guardian to care for minor children

## **REVOCABLE TRUST**

- Used to transfer your assets
- Appoint a trustee to hold and take care of your property in accordance with the terms in the trust

## **DURABLE POWER OF ATTORNEY**

- To appoint another individual to make business, financial and legal decisions on your behalf

## **HEALTH CARE PROXY**

- Grant someone the responsibility to make medical decisions when you're no longer able to do so
- This person is named as your healthcare agent

## **LIVING WILL**

- Provides guidance to healthcare agents.
- Express your wishes to end of life documents (feeding tube, ventilator, life support etc.)