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ESTATE PLANNING 101

1. Estate planning essentials for avoiding probate – death and incapacity
    a. Revocable Trust
    b. Pour Over Will
    c. Durable Financial Power of Attorney
    d. Advanced Health Care Directive
2. The Revocable Living Trust
    a. Structure – simple trust, disclaimer trust, A/B or A/B/C trust
    b. Distribution – outright or not?
        i. Minor's Trust
        ii. Special Needs
        iii. Other continuing trusts
    c. Successor Trustee – family/friends or professional?
3. Funding your Trust
    a. Deeds for real property
    b. Certification of Trust for financial companies – banks and brokerage companies
    c. Assignment of business interests – LLCs, Corporations, Partnerships
    d. IRAs, 401(k)s, and other retirement accounts
        i. Beneficiary Designations
        ii. Vehicle for charitable gifting
    e. Life Insurance
    f. Personal property
4. Maintaining your trust
    a. When to review – 5 to 10 years OR
    b. Be mindful of changes in assets or family structure
    c. Refinancing on real estate
5. Recent changes in the law
    a. Prop 19 and the parent to child reassessment exclusion
    b. Digital assets
    c. Portability and the estate tax
        i. Current exemption amount this year is $13,610,000
        ii. Sunset in 2025 – back to approximately $5m - 6m
    d. Capital gains?

"Ask First!"

This form is to be filled out by any person who is offering legal, financial, retirement, insurance, accounting, estate, long-term care or similar planning services. Respond to ALL categories completely; sign and date at the bottom of the page.

① **MY EDUCATION-** I have achieved the following level of education (check HIGHEST level achieved):

☐ Some High School	☐ High School Diploma	☐ Bachelors Degree
☐ GED	☐ Some College	☑ Masters or other Advanced Degree

② **MY CREDENTIAL(S)-** I have the following specialized credential(s) and training (examples: CFP, ChFC, CLU, CPA, JD, MBA, years of relevant experience):

JD – 10 years

③ **MY RELEVANT LICENSE(S)-** I have the following license(s) giving me the legal authority to provide the services I am offering to you (examples: bar license (attorney); securities license; insurance license):

License Type	Covers What Activities	Issued By	License No.
CA State Bar	Practice of law	CA	310668

④ **LEGAL SERVICES-** (Check ONE):

☐ I DO NOT practice law, and the services I am offering to you do not involve practicing law.

☑ I DO practice law, and have an active license to practice law in California.

☐ I DO practice law, but DO NOT have an active license to practice law in California. I am, however, under the supervision of the following attorney who has an active license to practice law in California:

Name of attorney:	Telephone:
Address:	

⑤ **OUR BUSINESS RELATIONSHIP-** Check TRUE or FALSE:

☑ True / ☐ False: In our business relationship, I will at all times serve as a fiduciary and put your interests before my interests and those of my employer.

⑥ **MY COMPENSATION-** I will be paid in the following way (commission, fee, salary, etc.), by the named person or company, in connection with the services I am offering to you:

Way(s) I'll Be Paid	Payment Will Be Made By (name each person or company)
Fee	Client

⑦ **FINANCIAL PRODUCTS / AFFILIATED ORGANIZATIONS-** Check TRUE or FALSE:

☐ True / ☑ False: I offer or sell annuities, insurance, mutual funds or other financial products; or I am, or my employer is, affiliated with a person or organization that offers or sells annuities, insurance, mutual funds or other financial products.

⑧ ***I certify under penalty of perjury that the responses herein are true to the best of my knowledge.***

Date: 5/23/24	Business Name: Blied, Dillon, & Mackey
Signature:	Address: 2260 N State College Blvd., Fullerton, CA 92831
Print Name: Austin N. Dillon	Telephone: (714) 671-1552