



LAW OFFICE OF CHERYL R. WATKINS

OFFICE ADDRESS:
6000 FAIRVIEW ROAD, SUITE 1200
CHARLOTTE, NORTH CAROLINA 28210
WWW.CRWATKINSLAW.COM

MAILING ADDRESS:
POST OFFICE BOX 472886
CHARLOTTE, NORTH CAROLINA 28247

OFFICE: 704.552.3993
DIRECT: 704.953.1884
FACSIMILE: 704.973.9737
EMAIL: CHERYL@CRWATKINSLAW.COM

Law Office of Cheryl R. Watkins

Typical Estate Plan Table of Contents – For a Married Couple

1. Summary of Your Plan Advisors
2. Pre-Addressed Letters to Financial Institutions with Funding Instructions
3. Information Regarding Your Trust Documents
4. Personal Data and Records
5. Durable Financial Power of Attorney - Husband
6. Durable Financial Power of Attorney - Wife
7. Health Care Power of Attorney - Husband
8. Health Care Power of Attorney – Wife
9. Nomination of Conservator – Husband
10. Nomination of Conservator – Wife
11. Living Will – Husband
12. Living Will – Wife
13. Guardians for Minors
14. Revocable Living Trust – Husband and Wife
15. Last Will and Testament - Husband
16. Last Will and Testament – Wife
17. Abstract of Trust
18. Trust Certification
19. Assignment of Personal Effects
20. Your Vital Documents - Gathered
21. Trust Funding Instructions
22. Final Instructions
23. Estate Administration Checklist, Instructions & Forms

Please contact the Law Office of Cheryl R. Watkins for a free telephonic consultation about how this comprehensive estate plan will help you prepare for your future and leave a legacy for your loved ones.