



ESTATE PLANNING:

- WILLS AND REVOCABLE LIVING TRUST PACKAGES, INCLUDING: FINANCIAL POWER OF ATTORNEY, MEDICAL POWER OF ATTORNEY, DIRECTIVE TO PHYSICIANS (LIVING WILL), DECLARATION OF GUARDIAN (FOR YOURSELF, MINOR CHILDREN, AND INCAPACITATED FAMILY MEMBERS), HIPAA RELEASE
- IRREVOCABLE TRUSTS
- SPECIAL NEEDS TRUSTS TO BENEFIT FAMILY MEMBERS WHO ARE DISABLED AND WILL CONTINUE TO NEED CARE FOR THEIR LIFETIME
- ESTATE TAX PLANNING
- CHARITABLE GIFTING
- FAMILY FOUNDATIONS

Probate and Estate Administration:

- Independent or Dependent Administration (assisting Executors and Trustees in navigating the probate process, whether or not there is a Will)
- Clearing title to real property that is inherited or gifted
- Affidavit of Heirship
- Court Determination of Heirship
- Funding of inheritance trusts
- Small Estate Affidavit

"STEPHANIE IS EXTREMELY KNOWLEDGEABLE IN ESTATE PLANNING AND HELPED ME IN CREATING THE APPROPRIATE DOCUMENTS INCLUDING WILLS, POWER OF ATTORNEYS, HEALTHCARE PROXIES AND THE LIKE."

"SHE PROVIDED PRAGMATIC ADVICE SO I COULD NOT ONLY COMMUNICATE MY WISHES EFFECTIVELY BUT ALSO SET UP MY POA/EXECUTOR TO ENSURE SUCCESS IN WHAT WILL BE A CHALLENGING TIME IN THE FUTURE."



Guardianship:

- Guardianship of the Person of people with special needs; specifically, children who are about to turn, or have already turned, 18 years of age
- Guardianship of the Estate for adults who need someone to step in and manage their assets
- Transfer of guardianship across county and state lines
- Appointment of Successor Guardian
- Discussion of Less Restrictive Alternatives and Power of Attorney

Special Needs Planning:

- Special Needs Trusts
- Estate Planning
- Supplemental Security Income (SSI) and Social Security Disability Insurance (SSDI) guidance and advice
- Medicaid and Waiver Programs