

Webinar Key Concepts



How to Get Your Estate Plan Done and Avoid Probate. . .

1. _____% of what the Ritchie Law Office, Ltd. does is _____
_____ and _____.
2. Attorney Chad A. Ritchie does almost _____ Estate Plans a year.
3. _____% of those surveyed thought that “Dying Without Having Affairs in Order” is Seen as _____; _____; and
_____.
4. _____% of people surveyed do not have “Basic Estate Planning Documents” which is defined as having all three of these documents:
_____; Power of Attorney for _____; and Power of Attorney
for _____.
5. People don’t get their estate planning done because they are not
_____ how Estate Planning works and the don’t know where to
_____.
6. The first meeting with the Ritchie Law Office, Ltd. is known as the
R _____ L _____ P _____ S _____.

7. **Probate** is the _____ process of transferring legal title to property from a person how has died to that person's _____ or _____.
8. **Probate Assets:** Assets that you own in your name only that _____ automatically transfer upon your death.
9. **Non-Probate Assets:** Assets that you own that _____ automatically transfer upon your death.
10. **Small Estate Affidavit:** An Affidavit that banks, financial institutions and other parties holding estate assets can rely on so that _____ can be transferred _____ having to go through Probate.
11. A **Small Estate Affidavit** can only be used for Estates who's entire _____ property estate value does not exceed _____.
12. A **Will** is a Document that says who _____ your _____ Assets.
13. A **Will** _____ control _____ Assets.
14. Having a Will _____ avoid _____.
15. **Revocable Living Trust:** A " _____ " that can hold title to assets for the benefit of one or more people.
16. **Important:** Assets Held in a **Trust** are _____ Assets.
17. **Power of Attorney:** A _____ that a person signs that designates an _____ to act on their behalf in the event they become _____.
18. At a **Ritchie Legacy Planning Session** you will Learn:
- How _____ works.
 - How your _____ are Organized
 - What kind of _____ Plan you need.
 - How much the Estate Planning will _____.