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## **Estate & Lifetime Planning for Domestic Partners**

### **Initial Issues:**

- Review of assets
  - Probate
  - Non-Probate
    - Jointly held
    - Solely held but with beneficiary designations
- Review of Insurance
  - Life Insurance (tie in with financial power of attorney)
  - Medical Insurance - job related
    - COBRA, HIPAA convertibility rights
    - Retiree health plan rights
  - Long term care insurance - recent group offerings PERS, PCC
    - include domestic partners
- Taxable or nontaxable estate?
  - Risks of Joint Ownership
  - Program of Gifting?
  - Charitable Split Interest Gifts?

### **Drafting Ideas & Suggested Language to Include**

- Financial Power of Attorney
- Health Care Directive
- Will
- Living Trust
- Nomination of Guardian & Conservator

### **Administering the Estate or Trust - special concerns for domestic partners**

- After incapacity
- After death

