



Welcome!

The Truth about Trusts, Wills & Probate

So many questions and so little time! We realize that when attending seminars, it can sometimes feel as though you are drinking water from a firehose, so feel free to use this worksheet as a tool to help you prepare for the audience Q & A portion of the program at the end. Remember... **every question is a GOOD question!!!!**

Hosts/Moderator:

- Annette & Brett Junell, Downsizing Coaches & Realtors, Junell Realty Group – Retired Moves Division @ Keller Williams (775) 432-6300

Panelists:

- Janine Norvick, Escrow Administrator, Ticor Title of Nevada, Inc.
- Lisa Bruce, Attorney, Schulze Law Group

My burning question starters:

I was wondering... I am curious about... I had this friend who wanted to know...
What if... I've always wanted to know... I heard... Would you clarify...

My burning question(s) / Notes:

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Trusts, Wills & Probate

The probate process is expensive, time consuming and should generally be avoided if possible:

TRUE or FALSE

The cost of probate is approximately: ____% to ____% of the value of the estate, which includes:

Real property, _____, _____, _____

My estate value \$ _____ x _____% = \$ _____ ≈ cost of probate

A "Deed Upon Death" is a good estate planning tool: TRUE or FALSE

Why?

A "Quitclaim Deed" is a good estate planning tool: TRUE or FALSE

Why?

The vast majority of people should have a Trust & Will: TRUE or FALSE

Common situations where seniors have been taken advantage of as it relates to today's topic:

1. _____
2. _____
3. _____

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