

Estate Planning Questionnaire
Blair Cato Pickren Casterline, LLC

FREQUENTLY USED TERMS

- Personal Representative: A Personal Representative, in some states called an Executor, handles your affairs after death when appointed by the probate court. These include gathering your assets, paying your creditors, and distributing all other assets as you direct in your Will.
- Guardian: Except in unusual circumstances, the surviving parent will have priority to serve as Guardian; otherwise, the court routinely appoints the person you name in your Will (though it is not absolutely required to do so).
- Agent: Your agent under a Durable Power of Attorney is customarily given broad powers to deal with your assets during your lifetime as if you yourself were present and acting. This is a broad power and you will want to discuss whether it is necessary to minimize its wrongful use.
- Health care surrogate/agent: The person who can make healthcare decisions for you if you are unable to do so.
- Living Will: A Living Will confirms your desires regarding being kept alive using artificial means.