

ANTHONY DELAS

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Legal Services Provided

Wills - Trusts - Guardianship - Conservatorship - Power of Attorney - Health Care Directive - Life Insurance Trust - Probate - Asset Protection – Business Law - Bankruptcy – Construction Defects – Intellectual Property

What Differentiates me From Others?

Widowed - understand the clients' potential pain
Home Visits at no extra charge (particularly useful for homebound clients)
Free Consultations (thorough understanding of client's situation)
Flexible Hours (accommodates those with fixed schedules)
Flat Fee Arrangement (fixed costs, no surprise fees)
Client Education (enables clients to amend their own documents)

Personal Goals:

Continue Exceeding Client Expectations
Provide Reasonable Cost Legal Services
Provide Assistance to Low Income Families
Continue fund raising for non-profits

PRACTICE AREAS

WILLS
GUARDIANSHIP
TRUST
POWER of ATTORNEY
HEALTH CARE DIRECTIVE
AMENDMENT PRACTICE
BUSINESS LAW
BANKRUPTCY
CONSTRUCTION
INTELLECTUAL PROPERTY

CREDENTIALS:

Over 25 years of combined Business/Legal experience
J.D., NW Cal. University
B.S. E.E. University of California, Berkeley
Member Calif. Bar Association, S. C. County Bar Association
Admitted to Practice before State and Federal Courts

The following **Estate Plan Summary** table illustrates the very minimum considerations that must be given in planning one's estate. The subsequent "**Don'ts and Do's**" slides warn of the main pitfalls to be avoided.

ESTATE PLAN SUMMARY

What You Need to Accomplish	No Will	Basic Will	Living Trust	AB Trust	QTIP Trust
Selectivity					
Permits you to select the beneficiaries of your estate	No	Yes	Yes	Yes	Yes
Permits you to select the executor of our will	No	Yes	Yes	Yes	Yes
Permits you to select the trustees of our trust	No	NA	Yes	Yes	Yes
Permits you to select the guardians for our children	No	Yes	Yes	Yes	Yes
Probate					
Avoids the time-consuming and expensive probate Process	No	No	Yes	Yes	Yes
Timing of Distributions					
Permits distribution of assets in stages rather than outright at the age of 18.	No	No	Yes	Yes	Yes
Protection					
Prevents conservatorship of estate owner	No	No	Yes	Yes	Yes
Protects beneficiaries' assets from creditors	No	No	Yes	Yes	Yes
Estate Taxes	No	No	No	Yes	Yes
assists married couples in reducing estate taxes	No	No	No	Yes	Yes
Asset Preservation	No	No	No	No	Yes
Allows the first spouse to die to name beneficiaries of his or her assets while permitting the surviving spouse to utilize the assets and while still deferring estate taxes					

These are bare minimum consideration that need to be given to an estate plan. This is NOT a legal advice. See assistance of qualified attorney.

Don'ts Of Estate Planning

Don't Die intestate (no papers....at least 30% goes to others)

Don't Die With a Will Only (about 4+% of the gross goes to others)

Don't Die Owning Life Insurance Policy (added to your estate)

Don't Die Without a Health Care Directive (end of life costs)

Don't Die Owning Property in Joint Tenancy (capital gains)

Don't Live Without a Durable Power of Attorney (competency)

Do's Of Estate Planning

1. Make an Integrated Estate Plan
 - Pour Over Will
 - Revocable Trust
 - Health Care Directive
 - Durable Power of Attorney
 - Guardianship
2. Change the Ownership of Your Life Insurance Policy
3. Title All Real Property/Other Assets in Trust Name
4. Be Charitable
5. Consider Disability Insurance
6. Consider Long Term Health Care Insurance
7. Consider Irrevocable Life Insurance Trust (ILIT)

This information is not a legal advice but is provided for informational purposes only. Seek qualified legal counsel to address your specific situation.

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