
ONCE UPON A WILL



ESTATE PLANNING QUICK ACTION GUIDE

A COMPREHENSIVE GUIDE TO
PROTECT YOUR FAMILY



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Disclaimer: The stories and examples shared on "**Once Upon a Will**" are intended for general educational purposes to help Georgia residents understand estate planning concepts. They are not, and should not be considered, legal advice. For personalized guidance, please speak with an attorney licensed in your jurisdiction.

PIXAR

ESTATE PLANNING QUICK ACTION GUIDE

Welcome to Your Estate Planning Adventure

Thank you for listening to our Pixar estate planning podcast series! This quick action guide transforms the lessons from each episode into simple, actionable steps you can take today to protect your family's future.

Each Pixar story teaches us something crucial about estate planning. More importantly, each movie shows us what happens when families don't plan ahead or when life takes unexpected turns. Let's make sure your story has a happy ending.

This Content is Perfect for:

- Busy parents juggling family responsibilities
- Couples planning their financial future
- Anyone with aging parents or blended families
- Georgia residents seeking state-specific guidance

How to Use This Guide:

- Read the Episode Summary
- Complete the Quick Assessment
- Take the Recommended Action Steps
- Schedule Time to Implement

EPISODE 1: FINDING NEMO



SELECTING GUARDIANS: ENSURE
YOUR KIDS ARE ALWAYS IN SAFE HANDS

The Lesson: Just like Marlin needed a plan for what would happen to Nemo if something happened to him, parents need legal guardians named in their will.

Quick Assessment:

- ☐ Do you have minor children?
- ☐ Have you named legal guardians in your will?
- ☐ Have you discussed this with your chosen guardians?
- ☐ Do you have backup guardians named?
- ☐ Have you considered your children's special needs or disabilities?

Action Steps:

1. Choose Primary Guardians - Consider values, lifestyle, location, and willingness to serve
2. Name Successive Guardians - Have backup options in case your first choice can't serve
3. Legal Documentation - Include guardian nominations in your Georgia will with proper execution
4. Have "The Talk" - Discuss expectations, parenting philosophy, and your children's unique needs

🚩 Red Flag Warning:

Without named guardians, Georgia courts will decide who raises your children, and family members may fight over custody like "seagulls over a French fry."

EPISODE 2: UP

INCAPACITY PLANNING: APPOINTING KEY HELPERS



The Lesson: Carl's gradual decline shows that young parents and individuals need incapacity planning too - accidents and illness can happen at any age.

Quick Assessment:

- ☐ Do you have a Durable Power of Attorney for Finances?
- ☐ Do you have a Georgia Advance Directive for Healthcare?
- ☐ Have you chosen trustworthy Agents for both documents?
- ☐ Do your Agents understand your wishes and values?
- ☐ Have you discussed your preferences with family?

Action Steps:

1. Create Financial Power of Attorney - Choose someone to manage money and legal affairs when you can't
2. Execute an Advance Directive for Healthcare - Name someone to make medical decisions and communicate your end-of-life wishes
3. Choose Agents Carefully- Select people who are responsible, available, and understand your values
4. Provide Clear Instructions - Document your preferences and communicate them to your chosen agents

🚩 Red Flag Warning:

Without proper incapacity planning, your family may need expensive court proceedings to manage your affairs, and strangers may make medical decisions for you.

EPISODE 3: THE INCREDIBLES



CREATING CUSTOM PLANS: DESIGN YOUR JUST RIGHT PLAN

The Lesson: Every family has unique "superpowers" and challenges - your estate plan should be custom-designed for your family's situation, not one-size-fits-all.

Quick Assessment:

- ☐ Is your estate plan customized to your family's specific needs?
- ☐ Have you used generic templates or online forms?
- ☐ Do you have children with special needs or unique circumstances?
- ☐ Does your plan address your family's privacy concerns?
- ☐ Have you considered each child's individual needs and challenges?

Action Steps:

1. Assess Your Unique Situation - Consider family structure, special needs, business ownership, and complex dynamics
2. Avoid Cookie-Cutter Solutions- Work with professionals who understand your specific circumstances
3. Address Individual Needs - Consider what each family member actually needs, not just equal distribution
4. Include Detailed Instructions - Explain your reasoning and provide guidance for unique situations

Red Flag Warning:

Generic estate plans often fail when families need them most because they don't address the real complexities of your unique family situation.

EPISODE 4: COCO



BLENDED FAMILIES: CREATE A PLAN THAT WORKS FOR EVERYONE

The Lesson: Like the complex Rivera family tree, blended families need estate plans that honor all relationships and protect everyone you love.

Quick Assessment:

- ☐ Do you own a home or significant assets in Georgia?
- ☐ Do you want your family to avoid probate court delays and costs?
- ☐ Are you concerned about privacy (probate is public record)?
- ☐ Do you want to control when and how your children inherit?
- ☐ Have you considered the benefits of trust-based planning?

Action Steps:

1. Understand Trust Benefits - Avoid probate, maintain privacy, control timing of distributions
2. Create and Fund Your Trust - Transfer ownership of assets to the trust (don't just create an empty "toy box")
3. Choose Successor Trustee - Select someone responsible to manage your family's financial future
4. Provide Clear Instructions - Specify when and how beneficiaries receive distributions

Red Flag Warning:

Without proper planning, your family's inheritance could be stuck in probate court for 12-18 months, costing 3-7% of your estate's value in fees.

EPISODE 5: TOY STORY



AVOIDING PROBATE COURT: USING REVOCABLE LIVING TRUST

The Lesson: Just like Andy could give his toys directly to Bonnie, trusts allow your assets to pass directly to beneficiaries without court involvement.

Quick Assessment:

- ☐ Are you remarried with children from a previous relationship?
- ☐ Does your spouse have children from a previous relationship?
- ☐ Have you updated your will since remarrying?
- ☐ Are all children (biological and step) clearly provided for?

Action Steps:

1. Update Your Will - Specify how assets should be divided among all children
2. Review Beneficiaries - Update life insurance, retirement accounts, and bank accounts
3. Consider Trusts - Protect inheritance for biological children while providing for your spouse
4. Have "The Conversation" - Discuss expectations with your spouse about inheritance

🚩 Red Flag Warning:

If you haven't updated your estate plan since remarrying, your new spouse may inherit everything, leaving your biological children with nothing.

EPISODE 6: CARS

PROTECTING YOUR BUSINESS : SUCCESSION PLANNING FOR YOUR FAMILY-OWNED & SMALL BUSINESS



The Lesson: Like the businesses in Radiator Springs, your family business needs its own specific succession plan to preserve its value and legacy.

Quick Assessment:

- ☐ Do you own a family business or professional practice?
- ☐ Do you have business partners who need buy-sell agreements?
- ☐ Have you identified and trained potential successors?
- ☐ Is your business succession plan separate from your personal estate plan?
- ☐ Do you have adequate life insurance to fund business transitions?

Action Steps:

1. Create Buy-Sell Agreements - If you have partners, establish what happens when someone dies or becomes incapacitated
2. Identify and Train Successors - Don't assume family members can or want to run the business
3. Use Trusts for Business Assets - Separate business succession from personal estate planning
4. Fund the Plan - Ensure adequate life insurance or other resources to execute the succession plan

🚩 Red Flag Warning:

Without business succession planning, your family business could be sold quickly for much less than its value, or family conflicts could destroy what you built.

CREATING YOUR "HAPPILY EVER AFTER"

Congratulations! You've learned essential estate planning lessons from Pixar's most beloved stories. Now it's time to turn this animated wisdom into real protection for your family.

01

IMMEDIATE ACTIONS (NEXT 10 DAYS)

- ☐ Identify which movie lessons apply most to your family situation
- ☐ Gather existing estate planning documents for review
- ☐ Make a list of trusted people for various roles (guardians, agents, trustees)
- ☐ Schedule family discussions about your wishes and values

02

PRIORITY PLANNING (NEXT 30 DAYS)

- ☐ Address your most urgent need (guardians, incapacity planning, business succession)
- ☐ Begin conversations with chosen agents, guardians, and trustees
- ☐ Research qualified estate planning attorneys in Georgia
- ☐ Start organizing important documents and financial information

03

PROFESSIONAL GUIDANCE

While this guide provides a foundation, estate planning involves complex legal requirements specific to Georgia law. Working with a qualified estate planning attorney ensures your documents are legally valid and truly protect your unique family situation.

YOUR GEORGIA ESTATE PLANNING CHECKLIST

Essential Documents for Georgia Residents:

- ☐ **Last Will and Testament**
 - ☐ Names guardians for minor children
 - ☐ Distributes assets not in trust
 - ☐ Must comply with Georgia signature requirements
- ☐ **Revocable Living Trust**
 - ☐ Avoids Georgia probate process
 - ☐ Keeps family matters private
 - ☐ Provides incapacity protection
- ☐ **Georgia Advance Directive for Health Care**
 - ☐ Combines living will and health care proxy/agent
 - ☐ Follows Georgia's specific legal requirements
 - ☐ Should be HIPAA-compliant
- ☐ **Durable Power of Attorney**
 - ☐ Remains valid during incapacity
 - ☐ Should specify "durable" language
 - ☐ Consider separate POAs for different purposes
- ☐ **Beneficiary Designations**
 - ☐ Review annually for accuracy
 - ☐ Keep consistent with overall plan
 - ☐ Remember these bypass your will

READY TO DESIGN YOUR FAMILY'S HAPPY ENDING?

Your story doesn't have to be left to chance. Let's work together to create an estate plan that's "just right" for your family.

TAKE ACTION TODAY!

Schedule your **15-minute complimentary consultation** today to discuss how we can protect your family's future.

15-MINUTE CONSULT



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STAY TUNED FOR MORE STORIES

Remember: Every great Pixar story teaches us that love, planning, and looking out for each other lead to the best endings. Your family's story can have an amazing ending too - but only if you take action to write it.



De Monte Walker, Esq.
Founder, The Walker Law Practice, LLC

"The fairytale endings for our characters involved magic. In real life, you are the magic."
Plan Wisely, Live Fully & May Your Estate Plan Always be "Just Right"