

---

ONCE UPON A WILL



# QUICK ACTION GUIDE

A COMPREHENSIVE GUIDE TO  
PROTECT YOUR FAMILY



---

# TABLE OF CONTENTS

01

**Welcome**

02

**Episode 1: Goldilocks: Finding The "Just Right" Plan** - Skip the Cookie-Cutter Plans. Design a Plan that Truly Fits.

03

**Episode 2: Snow White: Appointing a Healthcare Agent** - Why a clear Healthcare Directive is essential in a Crisis When You Can't Speak.

04

**Episode 3: Jack & The Beanstalk: Choosing the Right Financial Agent** - Avoid costly mistakes with the right financial decision-maker for Your Power of Attorney.

05

**Episode 4: Hansel & Gretel: Selecting Guardians for Minor Children** - Ensure your Kids are always in safe hands.

06

**Episode 5: Cinderella: Planning for Blended Families** - Create a Plan that works for everyone.

07

**Episode 6: Little Red Riding Hood: Identifying the Right Helpers** - How to pick the perfect team for your plan.

08

**Your Next Steps**

09

**Checklist: Georgia Residents**

10

**The WLP Team's Contact**

**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.

# QUICK ACTION GUIDE

WALKER  
LAW  
PRACTICE

## Welcome to Your Estate Planning Journey

Thank you for listen to "Once Upon A Will"!

This Quick Action Guide transforms the lessons from each episode into simple, actionable steps you can take today to protect your family's future.

Every fairy tale teaches us something important about life - and about protecting what matters most.

### 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: GOLDILOCKS



## THE “JUST RIGHT” PLAN

**The Lesson: Goldilocks learned that one-size-fits-all doesn't work. Your estate plan needs to be "just right" for your family.**

### Quick Assessment:

- ☐ Is your current plan customized to your family's needs?
- ☐ Have you used generic online templates?
- ☐ Does your plan address your specific concerns?
- ☐ Have you reviewed your plan recently?

### Action Steps:

1. Assess Your Unique Needs - Family structure, assets, goals, concerns
2. Avoid Generic Solutions - Templates often miss important details
3. Work With Professionals - Get personalized advice for your situation
4. Regular Reviews - Update your plan as your life changes

### Red Flag Warning:

**Generic estate plans often fail when families need them most because they don't address specific situations.**

# EPISODE 2: SNOW WHITE



## HEALTHCARE DIRECTIVES: A PLAN FOR WHEN YOU CAN'T SPEAK (INCAPACITY OR UNDER A SPELL)

**The Lesson: Snow White couldn't speak for herself under the spell. You need someone to speak for you if you become incapacitated**

### Quick Assessment:

- ☐ Do you have a healthcare directive?
- ☐ Have you chosen a healthcare agent?
- ☐ Does your agent know your medical preferences?
- ☐ Is your directive legally valid in Georgia?

### Action Steps:

1. Choose Your Healthcare Agent - Someone you trust to make medical decisions
2. Document Your Preferences - End-of-life care, life support, organ donation
3. Execute Legal Documents - Georgia Advance Directive for Healthcare
4. Share With Family - Ensure your agent and family know your wishes

### 🚩 Red Flag Warning:

**Without a healthcare directive, family members may fight over medical decisions, or courts may decide for you.**

# EPISODE 3: JACK & THE BEANSTALK



## POWER OF ATTORNEY: PROTECTING YOUR FINANCES FROM BEAN BARGAINS

**The Lesson: Jack's Mother needed someone trustworthy and capable to manage her financial affairs. You need someone to handle your finances if you can't.**

### Quick Assessment:

- ☐ Do you have a durable power of attorney?
- ☐ Have you chosen your financial agent?
- ☐ Does your agent understand their responsibilities?
- ☐ Are there proper safeguards in place?

### Action Steps:

1. Select Your Financial Agent - Choose someone trustworthy and financially responsible
2. Define the Scope - Specify what powers your agent will have
3. Create Safeguards - Require accountability and reporting
4. Execute Documents - Make it legally binding with proper witnesses

### 🚩 Red Flag Warning:

**Without financial power of attorney, your family may need expensive court proceedings to manage your affairs during incapacity.**

# EPISODE 4: HANSEL & GRETEL



## GUARDIANS: SELECTING GUARDIANS TO PROTECT MINOR CHILDREN

**The Lesson: Hansel and Gretel were left without proper caregivers. Your children need designated guardians.**

### 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?

### Action Steps:

1. Choose Primary Guardians - Consider values, lifestyle, location, and willingness
2. Name Backup Guardians - Have alternatives in case your first choice can't serve
3. Legal Documentation - Include guardian nominations in your will
4. Financial Planning - Ensure guardians have resources to care for your children

### 🚩 Red Flag Warning:

**Without named guardians, courts will decide who raises your children, and it may not be who you would have chosen.**



# EPISODE 5: CINDERELLA



## BLENDED FAMILIES: CREATE A A PLAN THAT WORK FOR EVERYONE

**The Lesson:** Just like Cinderella lost her inheritance when her father remarried, blended families face unique challenges in protecting all children.

### 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: LITTLE RED RIDING HOOD



## TRUSTWORTHY HELPERS: PICKING THE RIGHT TEAM FOR YOUR PLAN

**The Lesson: Little Red Riding Hood trusted the wrong "person." Choosing trustworthy helpers in your estate plan is crucial for your family's protection..**

### **Quick Assessment:**

- ☐ Are you considering setting up a trust?
- ☐ Have you identified potential trustees?
- ☐ Do you understand trustee responsibilities?
- ☐ Have you considered corporate vs. individual trustees?

### **Action Steps:**

1. Understand Trustee Duties - Managing assets, following trust terms, acting in beneficiaries' best interests
2. Evaluate Candidates - Trustworthiness, financial skills, availability, impartiality
3. Consider Professional Trustees - Banks or trust companies for complex situations
4. Plan for Succession - Name backup trustees

### **🚩 Red Flag Warning:**

**The wrong trustee can mismanage assets, play favorites among beneficiaries, or even steal from the trust.**

# CREATING YOUR "HAPPILY EVER AFTER"

**Congratulations! You've learned essential estate planning lessons hidden in beloved fairy tales. Now it's time to turn this knowledge into action.**

## 01

### **IMMEDIATE ACTIONS (NEXT 10 DAYS)**

- ☐ Identify which episodes apply most to your situation
- ☐ Gather existing estate planning documents for review
- ☐ Make a list of people you trust for various roles
- ☐ Schedule time to discuss planning with your spouse/family

## 02

### **PRIORITY PLANNING (NEXT 30 DAYS)**

- ☐ Address your most urgent need (guardians, healthcare directive, etc.)
- ☐ Begin conversations with potential agents/guardians
- ☐ Research qualified estate planning attorneys
- ☐ Start organizing important documents and information

## 03

### **PROFESSIONAL GUIDANCE**

While this guide gives you a foundation, estate planning involves complex legal requirements that vary by state. Working with a qualified estate planning attorney ensures your documents are legally valid and truly protect your family

# 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



Proudly Serving Metro Atlanta Families

Address: 1775 Parker Rd. SE, Suite C-210  
Conyers, Georgia 30094

Phone: 678-825-4177

Email: [info@walkerlawpractice.com](mailto:info@walkerlawpractice.com)



## STAY TUNED FOR MORE STORIES

**Remember:** Every fairy tale teaches us that preparation and wisdom lead to happy endings. Your family's story can have the perfect 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"