



# Estate Planning from Home: What You Should Know

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**O**ver the past several weeks I have had many people contact me regarding their estate planning. Some are existing clients anxious to wrap up the process. Some are new

clients asking how they can prepare their estate plan. The stress and anxiety caused by the coronavirus, increased time alone and the news cycle have caused people to view their planning differently.

Estate planning is always important. An estate plan is the process of planning for your death or disability. A good plan takes care of you and your loved ones. Some documents, such as a will or a trust, are designed to carry out your wishes after your death. Others, such as financial powers of attorney or a healthcare directive, appoint someone to care for you if you are disabled. Both are important—even in normal times.

## Be Careful of Strict Signing Requirements

People should be careful of self-help estate planning. Each state has its own very specific requirements for how estate planning documents are signed. Minnesota and Wisconsin require multiple witnesses and normally a notary public to be physically present for a will signing. Some states require that the witnesses be “disinterested,” meaning that the witness should not benefit from the will.

If your state’s signing requirements are not met, there is a high likelihood that the document may not be enforced. This could mean that a court would refuse to honor the wishes in your will. To avoid that, always speak with an estate planning attorney prior to creating a document.

## Creative Alternatives for Social Distancing

Under normal circumstances, the estate planning process consists of meetings between an attorney and the clients. Typically, these meetings are face-to-face. Being together helps to ensure the client’s unique circumstances and objectives are understood.

Current state and federal guidelines are asking, and even requiring, people to minimize in-person meetings. This does not mean that planning needs to stop. One option that works well is video conferencing. Clients have joined conversations using their phones, tablets and computers, and have been able to have productive conversations about their estate plans. For clients who do not have that capability, simple phone conversations, no-contact drive-by signings with notaries or other carefully planned meetings are possible. Your estate planning can be completed during the pandemic with proper precautions. If you have questions about any of this, please contact me.



## MINIMIZING BUSINESS STRESS

Business and real estate transactions can be both exciting and stressful for parties involved. Don’t let hidden issues doom the deal or haunt you after closing. Attorney Brent Johnson provides counsel for buying and selling businesses, taking on or buying out shareholders and all types of business and real estate transactions. Contact Brent to assist with your business needs.

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