



*ESTATE PLANS
GONE SIDEWAYS*

Honorable David J. Cowan
South Bay Estate Planning Council Presentation
May 9, 2024

*TO MODIFY
OR NOT TO
MODIFY THE
ESTATE
PLAN?*



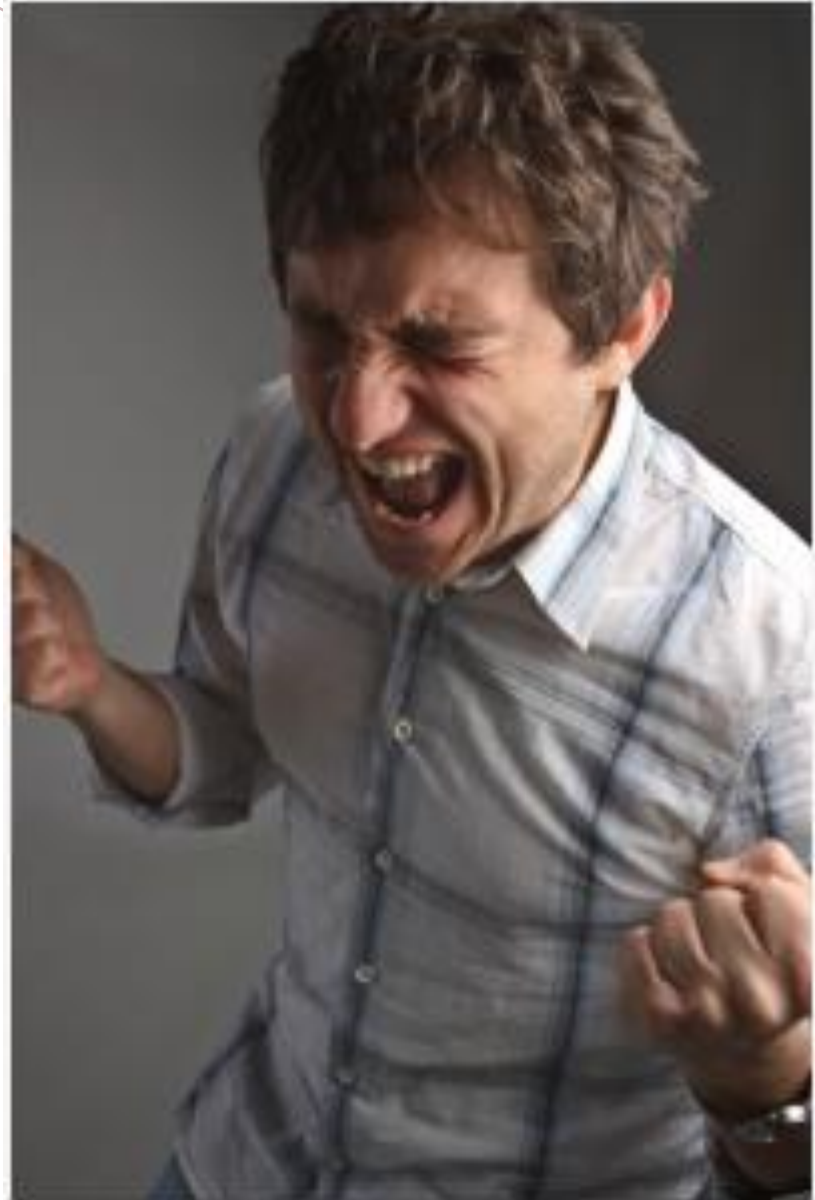


*SHOULD YOU
VIDEOTAPE
THE
SIGNING?*

*CHOICE OF WHICH
CHILD OR CHILDREN
TO SERVE AS
SUCCESSOR
TRUSTEE ON DEATH
OR INCAPACITY*



*THE
POWER OF
DENIAL*





*NOT
RECOGNIZING
DIMINISHING
CAPACITY*

*WHAT
DISTINGUISHES
A FIDUCIARY
FROM OTHER
PEOPLE?*



*INCORPORATING
MARITAL
PROPERTY ISSUES*





*NO CONTEST
CLAUSES*



THANK YOU