



Contact: Michelle-Shari@krusslaw.com (503) 490-4020 or <http://www.krusslaw.com>

Without proper planning, a well-intentioned estate plan may, unfortunately, result in unanticipated tax implications, costly court fees, family conflict and/or ill-timed financial distributions.

Yes. I would like to schedule an appointment:

Name: _____ **Cell:** _____

Email: _____

Please rate the following as to how important they are to you:

(H high concern, S some concern, L low concern, N/A no concern or not applicable)

Description **Level of Concern**

Information needed for a successful initial appointment with my office

Coordinating life/retirement beneficiary designations with your planning.

Addressing Digital Assets (Email accounts, bank accounts, Facebook, LinkedIn, Twitter and photo sharing)

Incapacity planning. Powers of Attorney(s) for Finance and Health.
You, your Spouse and any children over 18.

Providing for and protecting children (minor and adult)/spouse/parents.
What qualities make a great temporary and permanent Guardian?
What are the benefits of leaving money to children in trust.

Avoiding or reducing estate taxes. Oregon 1 million limit.

Business continuation planning, title to real property, non-US Citizen.

About Michelle-Shari Kruss J.D. C.D.R. Michelle-Shari has more than 23 years of legal-experience as an estate planning attorney, juvenile peer court judge, licensed mediator, arbitrator and negotiator. Previously with Arthur Andersen. An author, frequent guest lecturer, sits on a variety of non-profit boards (including UO PFA, Doernbecher Tom Sargent Safety Center, Make-A-Wish), wife and parent of two lovely children.