

Wills, Probate, Estate, and Related Issues  
Presentation to the Retired Unocal Employees

By Raymond W. Greer

September 13, 2018

*Introductory Remarks*

*Preamble*

*Periodic Review of Will and Estate Documents*

*Wills*

*Trusts to Avoid Probate with Update*

*Revocable Transfer on Death Deeds*

*ERISA*

*Joint Survivorship Accounts*

*Durable Power of Attorney*

*Medical Powers of Attorney and HIPAA Releases*

*Living Will*

*Designation of Guardianship for Adult*

*Designation of Guardianship for Children*

*Estate and Gift Taxes*

*Cautionary Tale*

*Conclusion*