











# “Martin’s Chart”

## Estate Planning Documents

Questions? Call Us Today:  
**314.881.6144**

| DOCUMENT            |  Avoid Probate |  Protect Assets |  Save Time |  Save Money |  Name Guardian |  Reduce Taxes |  Reduce Elder Costs |  Flexible Control |  Permanent No Control |  Cost To Prepare |
|---------------------|---|--|---|--|---|--|--|--|--|---|
| Will                |   |  |   |  | √   |  | √  |  |  | \$  |
| Pay On Death        | √   |  | √   | √  |   |  |  | √  |  | FREE  |
| Beneficiary Deed    | √   |  | √   | √  |   |  |  |  |  | \$  |
| Spouse Joint Owner  | √   | √√*  | √   | √  |   |  |  | √  |  | FREE  |
| Trust - Revocable   | √√√   | √√*  | √   | √  | √   | √*   |  | √  |  | \$\$\$  |
| Trust - Irrevocable | √√√   | √√√  | √   | √  | √   | √*   | √√√  |  | √  | \$\$\$  |
| Power of Attorney   | √*  |  | √   | √  |   |  | √√√  | √*   |  | \$  |

Key: √ = Provides Benefit. √√ = Provides Benefit Well. √√√ = Provides Benefit Best. √\* Limitations to Benefit Provided. \$ = Moderate Cost. \$\$\$ = Highest Cost.