

# CASSADY LAW OFFICES, P.C.

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[WWW.CASSADYLAWOFFICES.COM](http://WWW.CASSADYLAWOFFICES.COM)

**Please complete  
this intake prior  
to your  
consultation**

**LAS VEGAS:**  
10799 W. TWAIN AVENUE  
LAS VEGAS, NV 89135  
(702) 650-4480  
(702) 650-5561 FAX

**HENDERSON:**  
2400 W. HORIZON RIDGE  
HENDERSON, NV 89052  
(702) 650-4480  
(702) 650-5561 FAX

## CLIENT INFORMATION

**If you are known by any name other than your legal name, please include both:**

Legal Name(s): \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Spouse: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone Number: Cell: \_\_\_\_\_ Home: \_\_\_\_\_

Phone Number: Cell: \_\_\_\_\_ Home: \_\_\_\_\_

Email: \_\_\_\_\_

**YOU WILL BE MEETING WITH THE ATTORNEY. PLEASE COMPLETE THIS SHEET TO THE BEST OF YOUR ABILITY AHEAD OF TIME. IF YOU ARE MARRIED, YOU WILL NORMALLY APPOINT YOUR SPOUSE FIRST FOR EACH POSITION BELOW. IF THIS IS THE CASE, PLEASE WRITE "SPOUSE." Then, you must appoint an alternate person in the event that your spouse is unable or unwilling to perform the necessary duties.**

### LAST WILL AND TESTAMENT:

Marital Status: \_\_\_\_\_

Children (Adopted or Natural Born): \_\_\_\_\_ Age: \_\_\_\_\_

\_\_\_\_\_ Age: \_\_\_\_\_

\_\_\_\_\_ Age: \_\_\_\_\_

Do you live in assisted living, a skilled nursing, or rehabilitation facility? \_\_\_ YES \_\_\_ NO

**Please complete this intake prior to your consultation**

You must appoint a personal representative in your Will or Trust. Your personal representative is the person who will be responsible for the administration of your estate. You should appoint someone you trust

**Personal Representative**

**Name:**

\_\_\_\_\_

**Address:**

\_\_\_\_\_

\_\_\_\_\_

**Alternate Personal Representative**

**Name:**

\_\_\_\_\_

**Address:**

\_\_\_\_\_

\_\_\_\_\_

If you have minor children, you will also be appointing a Guardian for your children in your Will. The guardian of your children may be, but is not required to be, the same person(s) who will be handling the financial administration of your estate. You may also appoint someone to raise your children who is separate from the person you choose to handle the financial administration

**Guardian**

**Name:**

\_\_\_\_\_

**Address:**

\_\_\_\_\_

\_\_\_\_\_

**Alternate Guardian**

**Name:**

\_\_\_\_\_

**Address:**

\_\_\_\_\_

\_\_\_\_\_

The primary purpose of a Will is to direct the distribution of your assets according to your wishes. Accordingly, please indicate how you would like your estate to be distributed. You may indicate bequests of specific property, general monetary bequests, or a percentage of your estate:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**LAST REMAINS:**

In your Will you may also indicate your preference for the treatment of your last remains. Please state your wishes:

\_\_\_\_\_ Cremation

\_\_\_\_\_ Burial

\_\_\_\_\_ No preference

**ARE ANY OF THE NAMED BENEFICIARIES LISTED IN YOUR WILL/TRUST A PAID CAREGIVER?**

\_\_\_\_\_ YES

\_\_\_\_\_ NO

**FINANCIAL POWER OF ATTORNEY**

In your Financial Power of Attorney you will appoint someone to manage your financial affairs in the event you become incompetent at some time prior to your death. This power will **ONLY** come into effect in the event of such incapacity. This document grants your agent very broad powers and it is very important to appoint someone whom you trust a great deal to this position.

**Financial Agent**

**Alternate Financial Agent**

**Name:**

**Name:**

**Address:**

**Address:**

**Phone:**

**Phone:**

**HEALTH CARE POWER OF ATTORNEY**

In your Health Care Power of Attorney, you will decide the situations in where you want to refuse life-sustaining medical treatment. You will also appoint an agent to convey these wishes to your doctor in the event you become incapacitated and cannot make these decisions yourself.

**Health Care Agent**

**Alternate Health Care Agent**

**Name:**

**Name:**

**Address:**

**Address:**

**Phone:**

**Phone:**

Are you an organ donor? \_\_\_\_\_ YES \_\_\_\_\_ NO

Neptune Society provides Cremation and Burial Services. Would you like to receive more information? \_\_\_\_\_ YES \_\_\_\_\_ NO

## CLIENT ESTATE INFORMATION

**THIS INFORMATION IS STRICTLY CONFIDENTIAL AND IS USED TO HELP DETERMINE WHICH ESTATE PLAN IS BEST FOR YOU!**

**Do you own any interest in an LLC or a Corporation?**    \_\_\_ Yes            \_\_\_ No

**Real Property including your primary residence, land, rental properties and timeshares:**

Address	Estimated Value	Mortgage Amount

**Bank Accounts including checking, savings, money market accounts or CDs:**

Bank Name	Estimated Value

**Tax Qualified Investments including IRA, 401K, 403b, TSP:**

Custodian	Amount

**Non-Tax Qualified Investments including stocks, bonds, mutual funds, etc:**

Investment	Amount

**Life Insurance:**


**We also provide our clients with financial advising and review at no additional cost. Would you like more information on this service?**    \_\_\_\_\_ YES    \_\_\_\_\_ NO

**THIS SECTION FOR OFFICE USE ONLY**

**CLIENT E-MAIL:** \_\_\_\_\_

**ATTORNEY NOTES:**

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**INDEPENDENT ATTORNEY CERTIFICATION:** \_\_\_\_\_



## Two Convenient Locations

### Las Vegas:

10799 W. Twain Avenue  
Las Vegas, Nevada 89135  
(702) 650-4480

Located at Town Center & 215

### Henderson:

2400 W. Horizon Ridge Parkway  
Henderson, Nevada 89052  
(702) 650-4480

Located on Horizon Ridge  
Parkway and Carnegie

Call Today for Your  
Free Consultation

(702) 650-4480

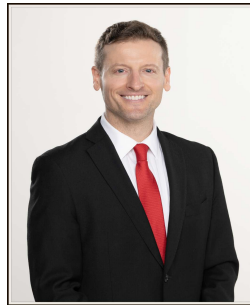
[www.cassadylawoffices.com](http://www.cassadylawoffices.com)



Jason E. Cassady, Esq.  
Brandi K. Cassady, Esq.

Jason E. Cassady, Esq., graduated from the University of Florida Levin College of Law, with Honors. From there, he went on to obtain his Master of Laws in Taxation from the University of Florida, one of the top programs in the United States. Mr. Cassady is also a Certified Financial Planner®, having passed one of the most stringent tests in the country for financial professionals. He is a member of the State Bar of Nevada, the Certified Financial Planner Board of Standards, the Clark County Bar Association, and the National Academy of Elder Law Attorneys.

Brandi K. Cassady, Esq., graduated from the William S. Boyd School of Law in Las Vegas, Nevada. She has worked for the firm for 17 years and went to law school in 2008 to join her husband in the practice as an attorney. Together, they create the legal team that has helped thousands of Nevadans over the years. She is licensed to practice law in Nevada and is also a member of the State Bar of Nevada, the Clark County Bar Association, and the National Academy of Elder Law Attorneys.



Brendan M. McGraw, Esq.

Brendan M. McGraw, Esq., joined the firm in 2014 and quickly became a member of the family. He graduated from the University of Miami School of Law. He is licensed to practice law in Nevada and is also a member of the State Bar of Nevada.

# A Practical Guide to Your Estate Planning Options



## Simple Will

This is the most basic type of Estate Plan that we offer:

Includes a Last Will and Testament, Power of Attorney for Financial Decisions, and Health Care Power of Attorney ("Living Will"); There are no hidden fees or costs

Allows you to choose the executor of your Estate and guides your family

Allows you to designate the beneficiaries of your Estate, rather than allowing state law to determine distribution

Allows you to designate a preferred guardian of you and your minor children should the need arise

Allows you to select cremation or burial and make your wishes known

Lowest cost option

This type of Estate Plan does have some disadvantages:

- Minor children and beneficiaries receive entire inheritance at age 18
- Estate is generally subject to probate, which can cost up to 5% of the value of your Estate
- Prior to age 18, funds for minor children and beneficiaries are held in a court-blocked account

**Total Cost Per Person: \$99**

## Our Family Helping Yours For Over 20 Years

For over 20 years, we have been helping Nevada families plan for their future. We are part of the Las Vegas local community and we have raised our family and firm here. We offer value-based services and do more estate planning than any other law firm in Nevada. Please call to schedule your free consultation today!



## Revocable Living Trust

This plan is similar to the other options, but allows you to avoid probate:

Includes a Pourover Will, Power of Attorney for Financial Decisions, Health Care Power of Attorney, Revocable Living Trust, Certificate of Trust and a Deed for your real property; There are no hidden fees or costs

Allows transfer of assets to heirs without going through probate and avoids fees and costs of probate

Allows you to provide an allowance to guardian of minor children

Allows flexibility and timing for distributions to minor or spendthrift beneficiaries

Allows you to maintain full control over assets during your lifetime

Maintains privacy because your Living Trust does not become public record upon death

Saves time and attorney fees when you pass

This type of Estate Plan does have some disadvantages:

- Higher cost than a simple will
- Must be funded properly to be effective

**Total Cost \$1195 Single or Married**