



CASSADY LAW OFFICES, P.C.

JASEN E. CASSADY, ESQ.
BRANDI K. CASSADY, ESQ.
BRENDAN M. MCGRAW, ESQ.
WWW.CASSADYLAWOFFICES.COM

LAS VEGAS:

9127 W. RUSSELL ROAD, Suite 110
LAS VEGAS, NV 89148
PHONE: (702) 650-4480
FAX: (702) 650-5561

HENDERSON:

2400 W. HORIZON RIDGE PKWY
HENDERSON, NV 89052
PHONE: (702) 650-4480
FAX: (702) 209-3770

CLIENT INFORMATION

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

Legal Name(s): _____ Date of Birth: _____

Phone #: _____

Spouse: _____ Date of Birth: _____

Phone #: _____

Address: _____

Email: _____

YOU WILL BE MEETING WITH THE ATTORNEY. PLEASE COMPLETE THIS FORM TO THE BEST OF YOUR ABILITY AHEAD OF TIME.

LAST WILL AND TESTAMENT:

Marital Status: _____

Children (Adopted or Natural Born): _____ Age: _____

_____ Age: _____

_____ Age: _____

_____ Age: _____

If you **do not** have any children, please list all parent(s) **and** sibling(s) below:

Parent(s): _____

Sibling(s): _____

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

PERSONAL REPRESENTATIVE

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. **IF YOU ARE MARRIED, YOU WILL NORMALLY APPOINT YOUR SPOUSE FIRST FOR EACH POSITION BELOW. IF THIS IS THE CASE, PLEASE CHECK THE SPOUSE BOX.** Then, appoint two alternates.

☐

I am married and would like my spouse to serve as my Personal Representative.

Personal Representative #1

Personal Representative #2

Name: _____

Name: _____

Address: _____

Address: _____

Phone #: _____

Phone #: _____

GUARDIAN

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 #1

Guardian #2

Name: _____

Name: _____

Address: _____

Address: _____

Phone #: _____

Phone #: _____

LAST REMAINS

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

☐

Cremation

☐

Burial

☐

No preference

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

PLEASE COMPLETE THIS INTAKE PRIOR TO YOUR CONSULTATION

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 (such as a vehicle or residence), general monetary bequests (e.g. \$25,000 to XYZ), or a percentage of your estate on the following page.

DISTRIBUTION OF ASSETS

I would like my assets to be distributed as follows:

ARE ANY OF THE NAMED BENEFICIARIES LISTED IN YOUR WILL/TRUST A PAID CAREGIVER? ☐ **YES** ☐ **NO**

ATTORNEY NOTES ONLY --- PLEASE DO NOT WRITE

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. **If you are married and would like your spouse to serve, check the box and appoint two alternates.**

☐

I am married and would like my spouse to serve as my Financial Power of Attorney.

Financial Agent #1

Financial Agent #2

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. **If you are married and would like your spouse to serve, check the box and appoint two alternates.**

☐

I am married and would like my spouse to serve as my Health Care Power of Attorney.

Health Care Agent #1

Health Care Agent #2

Name: _____

Name: _____

Address: _____

Address: _____

Phone #: _____

Phone #: _____

Are you an organ donor? ☐ **YES** ☐ **NO**

If you are married, is your spouse an organ donor? ☐ **YES** ☐ **NO** ☐ **N/A**

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

If you checked YES, please list the LLC/Corporation: _____

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 provide our law enforcement clients a service called address blocking for your real property at no additional cost? Would you be interested in this service? ☐ YES ☐ NO

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

We Offer Special Pricing For First Responders!

Which Do You Want For Your Family?

Will - \$49

OR

Trust - \$995

Probate

Heirs

- Road Blocks
- Court Supervision
- Assets are Public Record
- State Filing Fees
- Attorney Fees
- Time delays

- No Court Control
- No Time Delays
- Save \$\$\$\$

Heirs



Two Convenient Locations:

Las Vegas:
9127 W. Russell Road
Las Vegas, NV 89148

Henderson:
2400 W. Horizon Ridge Parkway
Henderson, NV 89052

(702) 650-4480
www.cassadylawoffices.com

— Thank You! —
For Serving Our Communities & Nation

About Us



Jasen E. Cassady, Esq.
Brandi K. Cassady, Esq.

Jasen E. Cassady, Esq., and Brandi K. Cassady, Esq., are the founding partners of Cassady Law Offices, P.C. Together, they have handled thousands of estate plans and probate cases over the last 24+ years. They regularly offer discounted services to police, fire, and active stationed military to serve Nevada's first responders. The Cassadys also have a set of law office dogs, Bandit & Justice.



Protecting Those Who Protect Us:

Estate Planning For:
Law Enforcement
Firefighters
Active Military



Cassady Law Offices, P.C.

Last Will & Testament

This is our most basic plan

It includes a Last Will and Testament, Power of Attorney for Financial Decisions, and Health Care Power of Attorney ("Living Will")

This plan allows you to choose the executor of your Estate and guides your family with your written wishes

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

Lowest cost option

The downside to this plan is that minor children and beneficiaries receive their entire inheritance at age 18, the Estate is generally subject to probate which can cost up to 5% of the value of your Estate, and funds for minor children are held in a court-blocked account until they reach age 18

Total cost: \$49 per person

Our Family Helping Yours For Over 24 Years

For over 24 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!



Jasen E. Cassady, Esq.
Brandi K. Cassady, Esq.
Brendan M. McGraw, Esq.

Revocable Living Trust

This plan is similar to the other options, but allows you to avoid probate and the significant associated costs

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 in Nevada (up to 3 included)

This plan allows the transfer of assets to heirs without going through the costs of probate

Allows flexibility and timing for distributions to minor or special beneficiaries

This plan is higher cost, but beneficial to first responders, who face higher risk of dying while on duty during their working years, potentially leaving minor children as heirs

Total cost: \$995 Single or Married (not per person)