

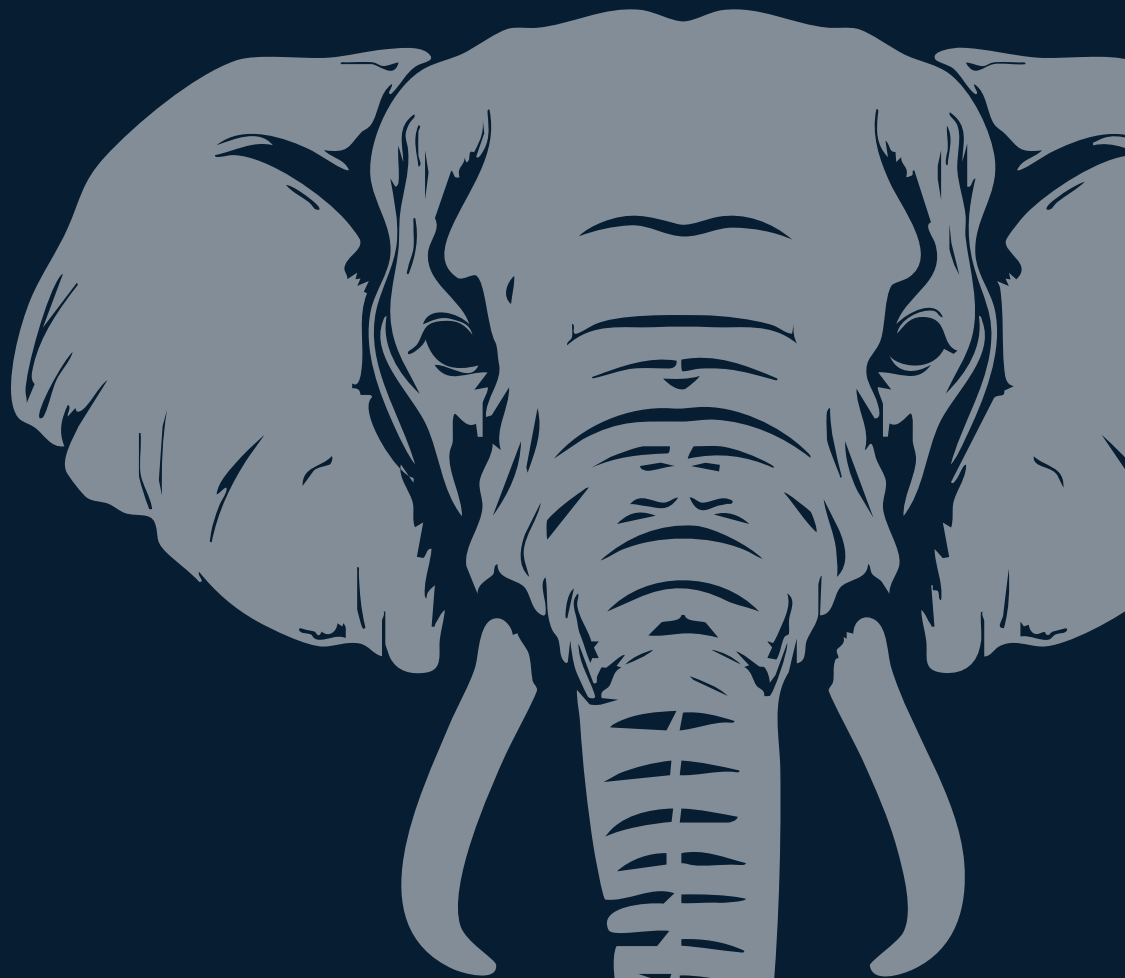
CORCORAN SMITH LAW
CALIFORNIA ATTORNEYS

ESTATE PLANNING

Your Roadmap to a Secure Legacy

A 5-step guide to building a California estate plan that protects your family, your home, and the people you love.

CALIFORNIA ESTATE PLANNING · WILLS · TRUSTS · PROBATE



WHY THIS GUIDE

Your estate plan should be as unique as you are.

California's high real-estate values, blended families, and complex business interests make a thoughtful estate plan one of the most valuable things you can leave behind.

Most California families never put a plan in place. The cost of waiting is steep: a probate estate can spend twelve to eighteen months in court and burn tens of thousands of dollars in fees that should have gone to your beneficiaries. A well-built estate plan keeps your assets out of probate, names the people who will speak for you, and gives your family clear instructions when they need them most.

INSIDE THIS GUIDE

The 5-step Corcoran Smith Law estate planning journey, the documents that go into a complete plan, common questions California families ask us, and the next step to take if you are ready to start.

THE ROADMAP

The 5-step Estate Planning Journey

How we work with California families to design, draft, and implement an estate plan you understand and trust.

STEP

01

Discovery & Strategy Session

Understanding your legacy vision. We delve into your goals, your family, and your assets, and create a custom strategy to protect what matters most.

STEP

02

Meticulous Document Drafting

Expertly tailored solutions. Our experienced attorneys craft legally sound documents that clearly reflect your unique plan – wills, trusts, powers of attorney, and health-care directives that fit together as one coherent system.

STEP

03

Review & Execution

Ensuring clarity and confidence. We carefully review every document with you, answer your questions, and guide you through the formal signing process so the plan is properly executed under California law.

STEP

04

Trust Implementation

Safeguarding your legacy. We provide clear, easy-to-follow instructions for the seamless transfer of assets into your trust – the step most families miss that quietly sends their estate back into probate.

STEP

05

Ongoing Guidance

Your plan evolves with you. After your trust is implemented we provide post-plan guidance and check-ins so your estate plan stays aligned with the marriages, births, deaths, and asset changes that life will inevitably bring.

WHAT'S INCLUDED

The documents in a complete California estate plan

A coherent system, not a stack of forms – every document reinforces the others.

Living Trust

Holds and manages your assets so your estate transfers privately and avoids California's probate court.

Pour-Over Will

Catches any asset that was missed and directs it into your living trust at death.

Durable Power of Attorney

Names someone you trust to handle your finances and legal affairs if you become incapacitated.

Advance Health Care Directive

Documents your medical wishes and names the agent authorized to make decisions on your behalf.

Property Assignment

Properly transfers and titles your assets into the trust – the step that makes the trust actually work.

Custom Documentation

Tailored provisions for blended families, business interests, and Prop 19 strategies.

WHY IT MATTERS

What estate planning gets you

- ✓ Family protection across generations
- ✓ Probate avoidance – keep your estate out of court
- ✓ Privacy – trusts are not public records
- ✓ Tax-aware structuring for California families
- ✓ Clear authority during incapacity
- ✓ Care directives for dependents
- ✓ Coordinated control of digital assets
- ✓ A plan that adjusts with your life

COMMON QUESTIONS

What California families ask us

Plain-English answers to the questions we hear most often.

Q. Do I need a living trust in California?

A. It is not legally required, but it is one of the most effective tools available to California families. Without a trust, your estate may face twelve to eighteen months in probate and thousands of dollars in court fees. A living trust transfers assets directly to your beneficiaries without ever entering probate.

Q. What is the difference between a will and a trust?

A. A will directs how your assets should be distributed after death but still requires probate to take effect. A trust holds your assets during your lifetime and transfers them at death without probate. California's high real-estate values make trusts especially advantageous.

Q. How much does estate planning cost in California?

A. It depends on the complexity of your estate. A basic plan is far less expensive than the probate costs your family would otherwise face – which can easily exceed tens of thousands of dollars on a modestly priced California home. Corcoran Smith Law offers flexible fee arrangements and transparent pricing.

Q. When should I update my estate plan?

A. After any major life event – marriage, divorce, the birth of a child, a substantial change in assets, or the death of a beneficiary or trustee. Even without a triggering event, plan to review your documents every three to five years to make sure they still comply with current law.

Q. What happens if I die without an estate plan in California?

A. Your assets are distributed according to California's intestacy rules, which the court applies regardless of what you would have wanted. Your estate goes through probate, which is lengthy, expensive, and entirely public. Planning ensures the people you love are protected and your legacy is preserved on your terms.

Q. Can you help with estate planning for blended families?

A. Yes. Blended families face unique challenges – protecting children from prior relationships, balancing the needs of a current spouse, and avoiding future conflicts between heirs. We design customized plans using trusts and beneficiary designations specifically structured for these situations.

YOUR NEXT STEP

What to bring to a free initial consultation

Bring whatever you have. We will work through the rest together.

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- ✓ A list of your major assets and rough values
 - ✓ Current deeds for any California real estate
 - ✓ Existing wills, trusts, or POAs (if any)
 - ✓ Beneficiary designations on retirement accounts
 - ✓ Names and contact info for proposed trustees
 - ✓ Names and contact info for guardians of minors
 - ✓ Any documented end-of-life or care wishes
 - ✓ Notes on family dynamics that matter to your plan

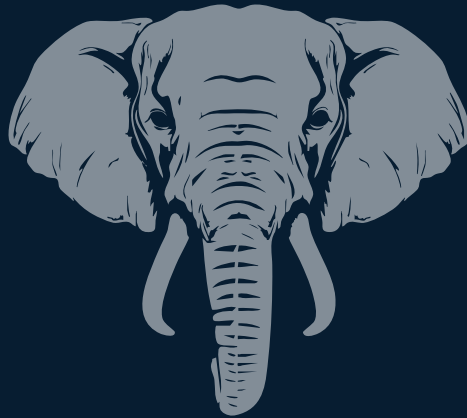
SCHEDULE YOUR CONSULTATION

Call (415) 275-1492 for a free initial consultation. We will listen to your situation, explain your options in plain English, and recommend the right next step — whether that is a full plan, a trust review, or simply a second opinion. Flat-fee, contingency, and hybrid engagement options are available.

WHY CORCORAN SMITH LAW

California-grown estate-planning practice serving the SF Bay Area, Sacramento, Los Angeles, and statewide. Personalized service, deep legal expertise, and transparent pricing — designed around the way California families actually live, not generic templates.

This guide is for general informational purposes only and is not legal advice. Reading or downloading it does not create an attorney-client relationship with Corcoran Smith Law. Consult a licensed California attorney about your specific circumstances before acting on any information here.



Corcoran Smith Law

Free initial consultation. Flat-fee, contingency, and hybrid engagement options.

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