



STEVE MUELLER'S –
SYNDICATE LEGAL SERVICES

LAST WILL &
TESTAMENT

Syndicate Legal Services – Last Will & Testament



SYNDICATE LEGAL SERVICES

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A Will (more formally called a “Last Will and Testament”) is the most common Estate Planning document known. Unfortunately, a Will has limitations that, for most people, render its effectiveness as their exclusive document obsolete.

Even if you don’t think you have a Will, in most States, you actually do. For example, in the State of California, a Will has already written a Will for you. It’s called “**Intestate Succession**,” which is codified in Probate Code §6400 *et. seq.* When you die, your estate will be distributed to the heirs in the order determined by these Probate Code sections. If you’re in the category of people with a very small estate with no spouse or minor children, things might get passed on without adverse consequences.

A properly drafted Will enables people to designate who their beneficiaries are, how they are to receive those assets (at once or over time) and who a parent of minor children chooses to nominate as the Guardian of their minor children. A testator (the person whose estate is the subject of the Will) has three basic options to choose from:

1. A hand-written Will (or “holographic” Will), which must be completely in the testator’s own hand writing (If California, Probate Code §6111);
2. A “fill in the blank” Will, usually from an Internet self-help website or local document preparation service (If California, Probate Code §6240);
3. A properly drafted and witnessed Will (If California, Probate Code §6110).

While the first two types of Wills are “legal”, they are rarely sufficient. A hand-written Will is usually written hastily upon impending death, which may be during the time when a person’s competency is most likely to be challenged. Think about it... if you don’t think death is imminent, why would you write it out by hand? A “fill in the blank” Will is also susceptible to competency challenges for the same reason. Also, neither of these Wills can ask the testator the right questions about their estate to determine which inheritance structure and other Will clauses are right for them.

ABOUT OUR MANAGING PARTNER

Mr. Steven Mueller is a Lawyer, Co-Founder & Senior Managing Partner of **Syndicate Legal Services** (www.SteveMuellerLegal.com). Mr. Mueller has more than twenty-five years of Law Office experience, including (but not limited to) 20 years of experience in Corporate & Investment Banking Law; 15 years of experience in Civil Litigation; 5 years of experience in person injury law, family law, and employment law; and 3 years of experience in Criminal Defense Law.

Mr. Mueller is a true pioneer in the Private and Public Capital Markets industry with more than twenty years of industry experience. Mr. Mueller has extensive experience in Alternative Trading Systems and Stock Exchange Legal & Compliance, structuring private and public securities offerings, and coordinating both public and private securities offerings through a syndicate network of FINRA Registered Broker Dealers, Investment Banks and Registered Investment Advisors. As of today, Mr. Mueller has participated approximate 200 IPOs and Rule 144A Equity Offerings, and nearly 2,500 capital markets transactions.

In addition, Mr. Mueller has completed the following courses: BA in Corporate Finance w/ Minor in Accounting (South Carolina); Law School (California Southern Law School); Three Years Law Office Study Program (LA Law, Beverly Hills); Paralegal & Advanced Paralegal Studies Certificates; FINRA series 6, 65 & 7; California Insurance (Property & Casualty, Life & Health, Commercial, Annuity, Earthquake, Flood & Long-Term Care); California Real Estate Sales; California Residential Mortgage; and California Bail Bonds. Mr. Mueller is also a United States Marine Corps Veteran (95-99, honorable discharge after completion of 4yr. tour of duty).



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