

## ESTATE PLANNING CHECKLIST

Estate planning should always be done with your goals and objectives in mind. Put your initials by issues that concern you. Write any other issues on the back of this page.

Your Name: \_\_\_\_\_

Spouse: \_\_\_\_\_

- |  |   |
|--|---|
| 1. I want a comprehensive estate plan that includes providing instructions for my own care while I am alive.   | 11. I want to prevent a child's spouse from taking my child's inheritance through divorce or otherwise.                             |
| 2. I want to maintain privacy and reduce costs by avoiding probate.  | 12. I want to protect the inheritance of my minor or disabled children or grandchildren and avoid a court conservatorship for them. |
| 3. I want to avoid, if possible, being the subject of a court conservatorship (living probate).                | 13. I want to disinherit one or more children or other family members.  |
| 4. I want protection for my spouse or children from overreaching creditors and financial predators.            | 14. I want to plan for my grandchildren directly rather than let them receive their parent's share of my estate.                    |
| 5. I want to reduce estate taxes to the lowest possible level.   | 15. I want to plan the transfer and survival of the family business.  |
| 6. I want to protect our children's inheritance if my spouse remarries after my death.                         | 16. I want a tax exempt trust for some assets that will give me a lifetime income and avoid capital gains tax.                      |
| 7. I want to plan for a child with disabilities or special needs.  | 17. I want to leave an endowment for my church or my favorite charities.  |
| 8. I want to plan for my children from a previous marriage.  | 18. I want to plan for elderly parents.   |
| 9. I want an educational trust that prevents my children from receiving all the trust funds at age twenty-one. | 19. I want assurance that my plans for long term nursing care or home care, if needed, will be followed.                            |
| 10. I want my life insurance to pass to my heirs estate tax free.  | 20. I have one or more pets that should be protected.   |