

Estate Planning Goals

It is often helpful for clients to think about some important estate planning issues before meeting with the attorney. Many of the decisions regarding your planning goals and needs are sensitive, and require serious thought and contemplation. Most of the time, clients feel more comfortable talking about these subjects without the attorney present, so we want to give you the opportunity to explore your positions, interests, and values regarding some important estate planning decisions in private with the assistance or help of loved ones.

Completing the below questions helps us gauge your estate planning needs and will help us ascertain what estate planning tools will work best to meet your goals. It also helps us get to know you a little better.

Here are some points that you may wish to consider before meeting with the attorney about your estate plan. 5 is most important, 3 is no opinion, and 1 is least important.

PLANNING ISSUES

	Rank of Importance				
	Low				High
1. Retaining Control During Lifetime.					
a. Getting our estate in order and creating a consistent and comprehensive estate plan.	1	2	3	4	5
b. Creating an estate plan which is valid in every state.	1	2	3	4	5
c. Controlling our assets while we are alive and healthy.	1	2	3	4	5
d. Overall importance of this issue.	1	2	3	4	5
2. Building Wealth.					
a. Investment assistance.	1	2	3	4	5
b. Overall importance of this issue.	1	2	3	4	5

	Rank of Importance				
	Low				High
3. Maintaining the Wealth I already have.					
a. Investment assistance.	1	2	3	4	5
b. Overall importance of this issue.	1	2	3	4	5
4. Planning for Incapacity.					
a. Planning for disability of myself or spouse.	1	2	3	4	5
b. Avoiding the expense, publicity, and loss of control involved in court proceedings if either of us is disabled.	1	2	3	4	5
c. Avoiding unnecessary placement in a nursing home by providing instructions for in home health-care.	1	2	3	4	5
d. Making sure my family and loved ones know what I consider “disability.”	1	2	3	4	5
e. Making sure my family and loved ones know what I consider “extra-ordinary measures.”	1	2	3	4	5
f. Making sure my family and loved ones know my wishes about receiving medical assistance at home versus a nursing home or assisted living.	1	2	3	4	5
g. Controlling which of our family or loved ones will make decisions for us if we’re incapacitated, including health care and life support decisions.	1	2	3	4	5
h. Planning for elderly parent’s disability.	1	2	3	4	5
i. Planning for the transfer and survival of the family business at disability or death.	1	2	3	4	5

	Rank of Importance				
	Low				High
j. Making sure my loved ones get the financial support they need if I am disabled.	1	2	3	4	5
k. Making sure my child's educational needs are met.	1	2	3	4	5
l. Overall importance of this issue.	1	2	3	4	5

5. Avoiding Probate. What hardships do you want your beneficiaries to avoid?

a. To preserve the privacy of my estate and my family from curious or dishonest persons, business competitors, or creditors.	1	2	3	4	5
b. Reducing burden on loved ones (cost, delay, and confusion associated with probate).	1	2	3	4	5
c. Avoiding contests and disputes upon death.	1	2	3	4	5
d. Overall importance of this issue	1	2	3	4	5

6. Ensuring Protection for Your Spouse and Loved Ones.

a. Providing for my surviving spouse.	1	2	3	4	5
b. Protecting our beneficiaries' inheritance if my spouse chooses to remarry after my death.	1	2	3	4	5
c. Protecting the assets of minor or disabled children, grandchildren, or other beneficiaries so that our family can avoid court control of their property under a conservatorship.	1	2	3	4	5
d. Protecting assets of financially irresponsible children or beneficiaries.	1	2	3	4	5

	Rank of Importance				
	Low				High
e. Protecting our children’s inheritance from loss if they should become divorced.	1	2	3	4	5
f. Planning for a child with disabilities or special such as medical or learning disabilities.	1	2	3	4	5
g. To plan for children from a previous marriage so that they are treated fairly in my estate plan.	1	2	3	4	5
h. Disinheriting one or more of my family members.	1	2	3	4	5
i. Protecting our beneficiary’s inheritance from frivolous lawsuits or the claims of predatory debt collectors.	1	2	3	4	5
j. Planning for grandchildren.	1	2	3	4	5
k. Protecting and caring for one or more pets.	1	2	3	4	5
l. Making sure our child is educated according to our wishes.	1	2	3	4	5
m. Protecting my child’s inheritance from substance abuse situations.	1	2	3	4	5
n. Overall importance of this issue.	1	2	3	4	5
7. Planning for Estate Taxes.					
a. Reducing estate and death taxes to the lowest level possible.	1	2	3	4	5
b. Saving 100% of the estate tax on life insurance so that the insurance proceeds pass estate tax free.	1	2	3	4	5

	Rank of Importance				
	Low				High
c. Potentially reducing income taxes and estate & inheritance taxes by including a charity in my estate plan.	1	2	3	4	5
d. Overall importance of this issue.	1	2	3	4	5
8. Legacy					
a. To creating a declaration that tells the purpose of my life or what my life stands for.	1	2	3	4	5
b. Creating a collection of stories and experiences captures my history and the wisdom I have gained over my years.	1	2	3	4	5
c. Developing how I want to be remembered after I pass away.	1	2	3	4	5
d. Overall importance of this issue.	1	2	3	4	5
9. Making Special Bequests to Individuals					
a. Monetary- Leaving specific amounts of money to a particular individual(s).	1	2	3	4	5
b. Property- Leaving specific pieces of property to to a particular individual(s).	1	2	3	4	5
c. Personal Effects- Leaving specific items of emotional significance, such as heirlooms.	1	2	3	4	5
d. Overall importance of this issue.	1	2	3	4	5

- | | | Rank of Importance | | | | |
|------------|--|---------------------------|---|---|---|-------------|
| | | Low | | | | High |
| 10. | Making Special Bequests to Charities or Other Organizations. | | | | | |
| | a. Giving a certain percentage of my estate to my church, college, community foundation, or other charity | 1 | 2 | 3 | 4 | 5 |
| | b. Creating a special trust for charity to which we can transfer assets that will give us lifetime income. | 1 | 2 | 3 | 4 | 5 |
| | c. Overall importance of this issue. | 1 | 2 | 3 | 4 | 5 |
| 11. | The Cost of Estate Planning. | | | | | |
| | a. Spending less initially, but paying more in the long-term. | 1 | 2 | 3 | 4 | 5 |
| | b. Saving money myself, but making my estate and beneficiaries pay more. | 1 | 2 | 3 | 4 | 5 |
| | c. Spending more myself, but saving my estate and beneficiaries money. | 1 | 2 | 3 | 4 | 5 |
| | d. Overall importance of this issue. | 1 | 2 | 3 | 4 | 5 |
| 12. | Do you want to be cremated? | | | | | |
| | <input type="checkbox"/> YES, I want to be cremated. | | | | | |
| | <input type="checkbox"/> NO, I do not want to be cremated. | | | | | |
| 13. | Do you want to donate your organs while you are alive? | | | | | |
| | <input type="checkbox"/> YES, I want to donate my organs while I am alive. | | | | | |
| | <input type="checkbox"/> NO, I do not want to donate my organs while I am alive. | | | | | |

14. Do you want to be the subject of medical testing?

YES, I want to be the subject of medical testing.

NO, I do not want to be the subject of medical testing.

15. Do you want to be the subject of medical testing if it is therapeutic?

YES, I want to be the subject of medical testing if it is therapeutic.

NO, I do not want to be the subject of medical testing, even if it is therapeutic.

16. Do you want to donate your organs when you die?

YES, I want to donate my organs when I die.

NO, I do not want to donate my organs when I die.

17. Other Special Considerations. What other goals and objectives for your estate plan were not mentioned? What are they?

Please review your list and enter the **top 3 estate planning goals** in order of importance to you.

1. _____

2. _____

3. _____

Do you currently have estate planning in force?
