

YOUR SPECIAL ESTATE PLANNING CONCERNS

Estate planning should always be done with your goals and objectives in mind. Please rank the top five (5) issues listed below that concern you (with 1 = most important) and mark any remaining issues which are important to you with a " ". Add any other goals, objectives, and concerns below or on the back side of this page. **Please return this page to us in advance of your appointment with your Estate Planning Client Information Worksheet.**

Please print your name on the line above

<u>Rank</u>	<u>Interest</u>	<u>Estate Planning Concern or Objective</u>
		Avoiding problems in case of your mental or physical disability
		Protecting your ability to receive assisted living support
		Protecting your family members from potential creditors
		Protecting your assets for your children if your spouse remarries
		Providing for the care of a minor child or children
		Protecting a child's inheritance in event of marital problems
		Providing for a family member who cannot handle money
		Providing for a disabled child or children
		Providing for management of a minor child's inheritance
		Planning for children from a prior marriage
		Providing an education fund for children or grandchildren
		Avoiding life support machines
		Avoiding probate
		Avoiding or reducing estate taxes
		Avoiding or reducing income taxes
		Providing liquidity to pay estate taxes and expenses
		Disinheriting a family member
		Allowing your life insurance to pass tax-free to beneficiaries
		Planning for the transfer and survival of your family business
		Benefiting one or more churches and/or charities in your estate plan
