

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 " ____ ". Finally, under "Stress Factor", indicate how much these issues concern you by providing a number rank from 1 (most worrisome – e.g. causing loss of sleep) to 10 (least worrisome). 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>	<u>Stress Factor</u>
___		Avoiding financial management problems in case of your mental or physical disability	___
___		Paying for the cost of 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 or divorce	___
___		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 probate	___
___		Avoiding or reducing estate taxes	___
___		Avoiding or reducing income taxes	___
___		Providing liquidity to pay estate taxes and expenses	___
___		Disinheriting a family member	___
___		Planning for the transfer and survival of your family business	___
___		Benefiting one or more churches and/or charities in your estate plan	___
___		Providing for surrogate health care decision-making and guidance	___
___		Other: _____	___