

Getting Started...
WHAT DO I WANT FROM MY ESTATE PLAN?

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This form will help you *begin* the estate planning process by identifying areas of special concern to you. You will be better prepared to work with a knowledgeable attorney specialist. Based on your current knowledge of estate planning, check those objectives which are of *personal importance* to you.

- 1. Keep personal, family and business affairs *private* after death.
- 2. Choose *guardians* for minor children and leave specific instructions for them.
- 3. Provide specific instructions for my *medical treatment* and life-sustaining measures.
- 4. Avoid probate court proceeding to appoint a conservator if a *disability* occurs
- 5. Save all *probate fees*.
- 6. Avoid federal estate *tax on life insurance* policy benefits.
- 7. Protect, assist and provide for *surviving spouse*.
- 8. Protect the assets of a surviving spouse if there is a *remarriage*.
- 9. Protect, assist and provide for one or more *children* (including children of a prior marriage).
- 10. Protect, assist and provide for other family members or *friends*.
- 11. Protect an inheritance from *creditors* of spouse, children and grandchildren.
- 12. Protect *family home* from unwanted sale, or allow for orderly and profitable sale.
- 13. Protect a *family business* from a distress sale or plan for an orderly transfer of ownership.
- 14. *Disinherit* one or more legal heirs.
- 15. Shelter the inheritance of a child from his/her spouse or former spouse.
- 16. Special planning for a physically or mentally *disabled family member* (spouse, child, parent).
- 17. Set up an *education fund* for one or more persons.
- 18. Fulfill a *child support* obligation without disrupting current family unit.
- 19. Plan for maximum use and flexibility of *retirement funds* (IRA, 401k, etc)
- 20. Benefit a charity, church, school or other *charitable organization*.
- 21. Create and endow a *private foundation* to serve a specific need or purpose.
- 22. Plan for an inheritance I expect to receive.
- 23. Coordinate my estate plan with the plans of other family members, to serve a *common goal*.
- 24. Set up a *family limited partnership* to achieve a transfer of a family business or family assets.
- 25. Shelter assets from claims and lawsuits through *offshore asset protection*.
- 26. _____

These "talking points" are used in our estate planning practice, and are made available to you to assist you in identifying your own important issues and needs. They are distributed for private use and may not be duplicated, reprinted or excerpted.