

ESTATE PLANNING GUIDE

In order to prepare for our meeting to discuss your estate planning goals and to make specific estate planning recommendations, we would need you to consider certain issues regarding your potential estate plan and also obtain from you some information and documents.

GOALS OF ESTATE PLANNING

- Provide for your spouse
- Arrange for the care of your minor or adult children
- Make certain your assets pass at death to your intended recipients
- Defer and minimize estate and gift taxes
- Provide the appropriate inheritance structure for your children and other beneficiaries

ISSUES OR MATTERS TO CONSIDER REGARDING YOUR ESTATE PLAN

- Candidates as guardians for your minor children
- Executors and trustees (individual or corporate fiduciary)
- Ownership of assets between you and your spouse
- Healthcare and property agents
- Ongoing and special needs trusts

INFORMATION OR DOCUMENTS TO SUBMIT TO US

- At least two years of individual income tax returns
- Income tax returns for any entities you control
- Copies of wills and trusts created
- Copies of any wills or trusts not created by you, but held for your benefit
- Healthcare Power of Attorney
- Property Power of Attorney
- Prior gift tax returns
- List of life insurance policies
- Premarital agreements
- Net worth or balance sheet statement