



ESTATE PLANNING GOALS & OBJECTIVES

Client Name: _____

Date: _____

Estate planning should always be done with your goals and objectives in mind. To assist you in articulating those objectives, please circle any issues that are important to you. Write any other goals on the backside of this page.

1. I want to create a consistent and comprehensive estate plan, which includes my own health care plan.
2. I want to plan for my elderly parents.
3. I want to preserve my privacy.
4. I want to reduce estate and death taxes to the lowest possible level.
5. I want to avoid probate and minimize settlement expenses for my family.
6. I want to plan for disability of my spouse or me and avoid court conservatorship.
7. I want to avoid unnecessary placement in a nursing home by planning for in-home health care.
8. I want to protect my children from a failed marriage by preventing their divorced spouse from taking my child's inheritance.
9. I want to protect the inheritance of my minor or disabled children or grandchildren and avoid court conservatorship/guardianship.
10. I want to control who will make health care decisions for me in the event of my incapacity.
11. I want to plan for my grandchildren directly rather than have them receive their parent's share of my estate.
12. I have one or more pets that should be protected and cared for.
13. I want to control all of my own assets while I am alive and healthy.
14. I want to save 100% of the estate tax on my life insurance so that all proceeds can pass to my heirs' estate tax free.
15. I want to create a special tax-exempt trust to which I can transfer some of my assets for a lifetime income and to avoid capital gains tax.
16. I want to protect my children's inheritance in the event my surviving spouse chooses to remarry after my death.
17. I want to plan for a child with disabilities or special needs.
18. I want to plan for my children from a previous marriage.
19. I want to give a donation to my church or favorite charities.
20. I want to disinherit one or more of my children or other family.