

## SOME COMMON ESTATE PLANNING OBJECTIVES

**Ratings :**      **Very Important (V)**                      **Somewhat Important (S)**                      **Not Important (N)**

- \_\_\_\_\_ 1.    Avoid Probate.
- \_\_\_\_\_ 2.    Minimize Estate Taxes on my death.
- \_\_\_\_\_ 3.    Assure your lifestyle.
- \_\_\_\_\_ 4.    Maintain control of your person and affairs.
- \_\_\_\_\_ 5.    Maintain privacy.
- \_\_\_\_\_ 6.    Special instructions for your children’s guardians. (Babysitter instructions, including permission to have child treated at medical facility.)
- \_\_\_\_\_ 7.    Continue annual giving to favorite church and charities.
- \_\_\_\_\_ 8.    Protect, assist, and help the surviving spouse.
- \_\_\_\_\_ 9.    Protect a surviving spouse from a bad remarriage.
- \_\_\_\_\_ 10.    Protect your child’s inheritance from divorce and other creditors.
- \_\_\_\_\_ 11.    Save the estate tax on life insurance.
- \_\_\_\_\_ 12.    Planning for a child with special needs.
- \_\_\_\_\_ 13.    Planning for an elderly parent.
- \_\_\_\_\_ 14.    Planning for a child of a previous marriage.
- \_\_\_\_\_ 15.    Disinheritance of a child.
- \_\_\_\_\_ 16.    Sharing your history, experiences, and life lessons with your loved ones.
- \_\_\_\_\_ 17.    Investing in your favorite charity.
- \_\_\_\_\_ 18.    Planning for your pets.

List other objectives.

- \_\_\_\_\_ 19. \_\_\_\_\_
- \_\_\_\_\_ 20. \_\_\_\_\_
- \_\_\_\_\_ 21. \_\_\_\_\_
- \_\_\_\_\_ 22. \_\_\_\_\_