

RANK YOUR Goals...

For us to be most effective as we discuss your estate plan, it is helpful for us to know what your concerns and goals are.

Below are some of the most common estate planning goals and concerns we hear from our clients.

Take a moment to think about what is most important to you and **RANK YOUR TOP TEN (10)** so we can focus our first discussions on these and then explain what we can do to best achieve your goals.....

- _____ I want to avoid probate
- _____ I want to minimize my estate tax exposure
- _____ I want to make things as easy as possible for my loved ones
- _____ I want to insure that my loved ones pay as little in taxes as possible
- _____ I want to protect my estate from being consumed by long term care costs
- _____ I want to protect my children's inheritances from bad marriages, law suits & debts
- _____ I want to plan for a child with special needs
- _____ I want to protect my spouse from a bad remarriage
- _____ I want to keep my affairs private
- _____ I want to share and pass along my values and ethics
- _____ I want to provide for my children in the event of the death of both my spouse & me
- _____ I want to be sure my charitable giving is carried on after I die
- _____ I want to be sure I am cared for as I want when I am unable to care for myself
- _____ I want to make sure only those people I choose can make decisions for me when I am not able to make decisions for myself
- _____ OTHER: _____
- _____ OTHER: _____
- _____ OTHER: _____