

The Legal ProfessionalsTM PA

Estate Planning Goals

Name: _____

Please circle the issues below that most concern you and write in any comments.

Issues	Comments
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 loved ones.	_____ _____ _____
6. I want to plan for disability of me or my spouse/life partner 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.	_____ _____ _____
10. I want to disinherit one or more of my children or other family members.	_____ _____ _____

11. I want to plan for my grandchildren directly rather than have them receive their parent's share of my estate.

12. I want to plan the transfer and survival of the family business.

13. I have one or more pets that should be protected and cared for.

14. I want to control all of my own assets while I am alive and healthy.

15. 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.

16. I want to create a lifetime income and to avoid capital gains tax on my assets.

17. I want to control who will make health care decisions for me in the event of my incapacity.

18. I want to protect my children's inheritance in the event my surviving spouse/life partner chooses to remarry after my death.

19. I want to plan for a child with disabilities or special needs.

20. I want to plan for my children from a previous marriage.

21. I want to leave an endowment for my church or favorite charities.

22. I want a plan in place that will pay for my care in disability and protect my estate.
