

Estate Planning Objectives

Some questions to consider

What should happen to your estate when you pass away?

- Do you wish to provide for your spouse, children, grandchildren, and friends?
- Do you wish to provide for charitable organizations?
- How do you wish to provide for people: outright or through trusts?
- Are there particular items of personal property you wish to give to specific individuals?
- If no beneficiaries survive you, how do you want your estate distributed?
- Do you wish to disinherit anyone?

Whom do you wish to oversee the distribution of your estate when you pass away? This may include collecting assets, paying debt, filing tax returns and completing necessary paperwork, hiring an attorney, and making sure your estate is distributed in accordance with your wishes.

Whom do you wish to name as executor or personal representative of your will?

Executor

Alternate executor

If you have a trust, whom do you wish to name as trustee?

Trustee

Alternate trustee

If you have minor children, whom do you wish to name as their guardian?

Guardian

Alternate guardian

What are your preferred funeral and burial/cremation instructions?

Do you have any personal directives or living wills?

Primary agent

Alternate agent

What are your wishes regarding the receipt of life-sustaining treatment in the event of an incurable condition?

Do you currently have an enduring power of attorney?

Primary attorney

Alternate attorney

Do you have any other power of attorney(s)?