

Some Basic Questions About Estate Planning

Please take a moment and answer the questions below. The answers to these questions can not only help you in your planning, but can help you focus your energy and resources.

How do I want my assets distributed when I die?

Do I have written instructions for loved ones?

Do we believe that equal is fair?

What lifestyle do we want to have for the rest of our lives?

Have we prepared each other and our children if we should die sooner rather than later?

What are our goals for the rest of our lives?

Can our children handle an inheritance outright, what about their spouses?

Are we concerned about leaving our assets only to heirs in our bloodline?

Will our current plan unite or divide our family when once we are no longer here?

Have we chosen our executor based on ability?