

WHAT ARE YOUR ESTATE PLANNING OBJECTIVES?

Name:

Date completed:

Rating 0 - 10 (10 being those considerations of greatest importance)

- ___ 1. Save probate expenses and time on first death.
- ___ 2. Save probate expenses and time on second death.
- ___ 3. Plan and provide for spousal incapacity.
- ___ 4. Plan and provide for both spouses' incapacity.
- ___ 5. Save 100% of the Federal Estate Tax on the first spouse's death.
- ___ 6. Reduce and if possible, eliminate Federal and/or State Estate Taxes on the second spouse's death.
- ___ 7. Maintain privacy.
- ___ 8. Protect, assist and help the surviving spouse.
- ___ 9. Protect, assist and help children.
- ___ 10. Protect, assist and help grandchildren.
- ___ 11. Protect a surviving spouse from a bad remarriage.
- ___ 12. Protect the share of the deceased spouse's interest in the trust upon the remarriage of the surviving spouse.
- ___ 13. Generation Skipping Tax Planning.
- ___ 14. Protecting your child's inheritance from bankruptcy or divorce.
- ___ 15. Survival of the family business.
- ___ 16. Sale of the family business upon the death of the entrepreneurial spouse.
- ___ 17. Sale of the family business upon the death of the surviving spouse.
- ___ 18. Asset Protection Planning.
- ___ 19. Creditor protection for the surviving spouse.
- ___ 20. Creditor protection for a child.
- ___ 21. Save 100% of the estate tax on life insurance.
- ___ 22. Special planning for a physically or mentally handicapped child.
- ___ 23. Special planning for an elderly parent.
- ___ 24. Special planning for a child of a previous marriage.
- ___ 25. Disinheriting a child.
- ___ 26. Medicaid Planning.
- ___ 27. Other:
- ___ 28. Other:
- ___ 29. Other:
- ___ 30. Other: