

GOALS LIST

Estate planning should always address *your* goals and objectives. Please circle those issues that concern you. Write any other goals on the back side of this page. **Then number the circled goals in priority order.** Number 1 is first priority.

Print Your Name

- a. I want a comprehensive estate plan which includes my own health care plan.
- b. I want to plan for my elderly parents.
- c. I want to preserve my privacy.
- d. I want to reduce estate and death taxes.
- e. I want to avoid probate and minimize settlement expenses for my family.
- f. I want to plan for disability of me or my spouse and avoid court guardianship.
- g. I want to avoid placement in a nursing home by planning for in-home health care if possible.
- h. I want to protect my child's or children's inheritance in the event my surviving spouse chooses to remarry after my death.
- i. I want to protect my child or children from their failed marriage by preventing their divorced spouse from taking my child's or children's inheritance.
- j. I want to plan for my child or children from a previous marriage.
- k. I want to protect the inheritance of my minor or disabled child, children, grandchild or grandchildren and avoid court oversight.
- l. I want to disinherit one or more of my children or other family members.
- m. I want to plan for my grandchild or grandchildren directly rather than have them ultimately receive their parent's share of my estate.
- n. I want to plan the transfer and survival of the family business.
- o. I have one or more pets that should be protected and cared for.
- p. I want to plan to eliminate the estate tax on my life insurance so that all proceeds can pass to my heirs estate tax free.
- q. I want to consider a gift to charity today which pays me a lifetime income and/or avoids capital gains tax.
- r. I want to control who will make health care decisions for me in the event of my incapacity.
- s. I want to plan for a child or children with disabilities or special needs.
- t. I want to leave an endowment for my church or one or more favorite charity.
- u. I want to set up a way to protect my assets from creditors.
- v. Other _____

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