

LIFE AND ESTATE PLANNING

GOALS & VALUES CHECKLIST

Name: _____

Date: _____

Estate Planning Issue		Importance						
			Least	Most			
1.	I want to get my estate in order and create a consistent and comprehensive estate plan.	Yes	No	1	2	3	4	5
2.	I want to avoid Probate Court to minimize settlement expenses for myself and my family after I die.	Yes	No	1	2	3	4	5
3.	I want to preserve the privacy of my estate and my family from business competitors, creditors, dishonest persons, or curiosity seekers.	Yes	No	1	2	3	4	5
4.	I want to reduce estate and death taxes to the lowest possible level.	Yes	No	1	2	3	4	5
5.	I want to avoid the need for my family to go to Probate Court to obtain guardianship in case I or my spouse becomes legally disabled.	Yes	No	1	2	3	4	5
6.	I want to avoid unnecessary placement in a nursing home by providing instructions for in-home health care.	Yes	No	1	2	3	4	5
7.	I want to plan to preserve assets in case I or my spouse needs nursing home care in the future.	Yes	No	1	2	3	4	5
8.	I want to protect my children in the event his or her marriage fails, by designing a plan whereby my children can control the property I leave to them, if they wish.	Yes	No	1	2	3	4	5
9.	I want my estate plan to protect the assets of my minor children or grandchildren.	Yes	No	1	2	3	4	5
10.	I am interested in discussing ways of passing on our family legacy to our children and grandchildren.	Yes	No	1	2	3	4	5
11.	I want to plan for my grandchildren.	Yes	No	1	2	3	4	5
12.	There is a specific asset, such as a vacation home, that I would like to plan for.	Yes	No	1	2	3	4	5
13.	I may have one or more pets to care for.	Yes	No	1	2	3	4	5
14.	I want to control all of my own assets while I am alive and healthy.	Yes	No	1	2	3	4	5

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| 15. | I want to save 100% of the estate tax on my life insurance so that all life insurance passes to my heirs estate tax free. | Yes | No | 1 | 2 | 3 | 4 | 5 |
| 16. | I may want to create a special trust for a charity whereby I can transfer some of my assets which will assure me of a lifetime income, while earning tax deductions. | Yes | No | 1 | 2 | 3 | 4 | 5 |
| 17. | I want to control which of my family or loved ones will make decisions for me in the event of my incapacity, including health care decisions, and life support decisions. | Yes | No | 1 | 2 | 3 | 4 | 5 |
| 18. | I want to avoid contests and disputes upon my death. | Yes | No | 1 | 2 | 3 | 4 | 5 |
| 19. | I may wish to protect our children's inheritance in the event my surviving spouse chooses to remarry after my death. | Yes | No | 1 | 2 | 3 | 4 | 5 |
| 20. | I want to plan for a child with disabilities or special needs, such as medical or learning disabilities. | Yes | No | 1 | 2 | 3 | 4 | 5 |
| 21. | I want to plan for children from a previous marriage so that they are treated fairly in my estate plan. | Yes | No | 1 | 2 | 3 | 4 | 5 |
| 22. | I may wish to remember charities in my estate plan. | Yes | No | 1 | 2 | 3 | 4 | 5 |
| 23. | I want to plan for the transfer and survival of the family business. | Yes | No | 1 | 2 | 3 | 4 | 5 |
| 24. | I want to disinherit one or more children or other family members. | Yes | No | 1 | 2 | 3 | 4 | 5 |

I have other goals and objectives for my estate plan not mentioned above, and they are:

Please review and list the top three goals in order of importance to you:

1. _____ 2. _____ 3. _____

Estate planning should always be done with the client's goals and objectives in mind. If your estate plan does not meet your legally obtainable goals and objectives, it is an inadequate plan. Life and estate planning is of vital importance, and will profoundly and inevitably affect everything in this world that you own, and every person in this world that you love. At the Law Offices of Dagmar Pollex, you can be certain that your plan is prepared thoughtfully and professionally.