

## ESTATE PLANNING GOALS

PLANNING ISSUE	IMPORTANCE				
	LEAST				MOST
<b>RETAINING CONTROL DURING LIFETIME</b>	1	2	3	4	5
<b>PLANNING FOR INCAPACITY</b>					
Financial Management	1	2	3	4	5
Health Care Issues	1	2	3	4	5
<b>AVOIDING PROBATE</b>					
Cost	1	2	3	4	5
Delay	1	2	3	4	5
Complication	1	2	3	4	5
Privacy	1	2	3	4	5
<b>SPOUSAL PROTECTION</b>					
Catastrophic Creditor Protection	1	2	3	4	5
Medicaid/Government Benefits Protection	1	2	3	4	5
Investment Assistance	1	2	3	4	5
Remarriage (Anti-Bimbo) Protection	1	2	3	4	5
<b>ESTATE TAX PLANNING</b>	1	2	3	4	5
<b>KEEPING ASSETS IN THE BLOODLINE</b>	1	2	3	4	5
<b>PLANNING FOR MINOR (GRAND) CHILDREN</b>	1	2	3	4	5
<b>PLANNING FOR BENEFICIARY’S “SPECIAL NEEDS”</b>	1	2	3	4	5
<b>PLANNING FOR ADULT CHILDREN</b>					
Investment Assistance	1	2	3	4	5
Tax & Administrative Assistance	1	2	3	4	5
Divorce Protection	1	2	3	4	5
Catastrophic Creditor Protection	1	2	3	4	5
Medicaid/Government Benefits Protection	1	2	3	4	5
<b>SPECIAL BEQUESTS TO INDIVIDUALS/CHARITIES</b>					
Money	1	2	3	4	5
Property (Business, Farm etc.)	1	2	3	4	5
Personal Effects	1	2	3	4	5
Charities	1	2	3	4	5



**OTHER SPECIAL CONCERNS? (Please Specify)**

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**IN ADDITION TO RETAINING CONTROL, PLEASE REVIEW AND LIST YOUR TOP 3 GOALS IN ORDER OF IMPORTANCE TO YOU.**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

