

Estate Planning Questions

- 1. Do I have a will?
- 2. Do I need a more extensive Estate Plan than just a Will?
- 3. What are my assets? What are my debts?
- 4. Who will be my Executor?
- 5. How do I want my assets distributed?
- 6. Do I need to name a guardian for my children?
- 7. Do I need to make special arrangements for my children from a previous marriage?
- 8. Do I want to leave something for my grandchildren?
- 9. Do I want to leave something to charity?
- 10. What special arrangements do I need to make for my business?
- 11. Do I have any special circumstances to address? (blended family, child with special needs, elderly/incapacitated parent)
- 12. Are Beneficiaries on all of my instruments current?