YOUR ESTATE PLANNING GOALS

It is important to us that we create an estate plan for you that meets all of your goals.
Please indicate all goals that are Important to you.
(Use blank lines to add other goals and comments.)

Husband	Wife	Goals
		Provide a plan to manage/control property during disability free of court interference.
		Avoid probate and the fees and expenses associated with probate.
		Reduce estate taxes.
		Provide for our children.
		Protect our children from creditors and spouses.
		Establish and maintain an order of succession and control of family assets.
		Increase family wealth.
		Promote family harmony by insuring that any disputes will be resolved privately by arbitration rather than publicly through the court system.
		Provide for the needs of a disabled child or minor children.
		Provide for parents
		Protect my assets for my children in the event my spouse has a second marriage.
		Distribute our assets the way we want.
		Keep our children from paying estate taxes at their death on assets we gave them
		Give our individual property to our respective family. (Second marriage issue)
		Help family members be financially responsible.
		Maintain privacy from outsiders.
		Insulate our estate from creditors.
		Provide for charitable interests.
		Pay NO estate tax.
		Create a charitable endowment.
		Find more income to live on by restructuring assets.
		Make gifts to other family, friends and loved ones when I am gone.
		I have no interest in providing for my children or heirs.
		Utilize my Generation-skipping Exemption to provide for future heirs.
		Maintain current lifestyle.
		Keep family business, farm, or land holding intact for our family after our death.
		Defer taxes on IRA's as long as possible.

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