



A Few Things to Think About Before We Talk

You do not need to have all of the answers. These questions are simply meant to help you start thinking about the people, property, and decisions that may be part of your estate plan.

Nothing you write here is final.

Bring whatever thoughts you have to our conversation - even if some sections are blank.

1

Who would you trust to step in?

If you could no longer manage your trust - or after your death - who would you feel comfortable having take over?

A few names that come to mind:

It is perfectly fine if you are not sure yet.

2

Who would you trust with financial matters?

Think about who could handle things such as bills, banking, property, and other financial affairs if you were unable to do so.

Someone I would consider:

A backup might be:

3

Who would you want speaking for you medically?

If you could not make or communicate your own health-care decisions, who would you trust to understand your wishes and make difficult decisions for you?

Someone I would consider:

A backup might be:

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4

Who are the people or organizations you want to provide for?

You do not need to work out percentages yet. Just think about the people or organizations you want to make sure we discuss.

☐ Children or grandchildren

☐ Charities or organizations

☐ Other family members

☐ Anyone who may need special planning

☐ Friends

People or organizations I want to make sure we discuss:

5

Anything else that matters to you?

Some assets and personal wishes deserve a little extra thought.

Your Home

Is there someone you particularly want to receive it? Should anyone be able to continue living there?

Things With Meaning

Jewelry, artwork, collections, family items - or anything else you especially want to go to someone.

Pets

Who would you want to care for them? Is there someone who could step in as a backup?

That's enough for now.

Bring whatever thoughts you have to our conversation. You do not need to complete every section, and nothing you write here is final. We will talk through your options together.

Questions or concerns you especially want to discuss:
