

# PERSONAL ORGANIZER



ELDER LAW  
LIFE CARE  
planning center

a practice with purpose

NAME \_\_\_\_\_

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## HOW DID YOU HEAR ABOUT US?

Please take a moment to let us know how you heard about the Elder Law & Life Care Planning Center.

Please Check One: ☐ Facebook ☐ Internet Search ☐ LinkedIn ☐ AVO ☐ Attended Forum

☐ Received Mailer ☐ Saw Ad In: \_\_\_\_\_

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## PERSONAL ORGANIZER

CONGRATULATIONS on taking a wise first step in developing a plan to manage your legal and financial affairs to best protect you and your family. This Personal Organizer is important to complete so that our initial meeting with you is most productive. Please complete this organizer as fully as possible so that you will gain the most advice that you can during our upcoming conference.

Please forward this Organizer to us at least one week prior to your meeting date so that we can be adequately prepared to accomplish as much as possible during our initial conference. If you prefer, you may mail or drop these items off at our office location in a sealed envelope marked "CONFIDENTIAL."

## PERSONAL INFORMATION

Your Legal Name \_\_\_\_\_

(name most often used to title property and accounts | First Name, Middle Initial, Last Name)

Also Known As/Preferred Name \_\_\_\_\_ Date of Birth \_\_\_\_\_ ☐ U.S. Citizen ☐ Naturalized Citizen ☐ Resident Alien  
(other names to title property and accounts or preferred name)

Home Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Bus/Cell Phone \_\_\_\_\_ Which number(s) would you prefer to be contacted at?  
☐ Home ☐ Cell What is the best time? \_\_\_\_\_

Email Address \_\_\_\_\_ ☐ okay to communicate via email? ☐ okay to communicate via text?

Former/Current Occupation \_\_\_\_\_ ☐ Retired ☐ Employed Employer \_\_\_\_\_

Relationship Status: ☐ Single ☐ Partner ☐ Formerly Married ☐ First ☐ Second ☐ Third ☐ Other \_\_\_\_\_

☐ Divorced Date of most recent Divorce \_\_\_\_\_ ☐ Widowed/Date of Death \_\_\_\_\_

Veteran: ☐ Yes ☐ No Veteran Spouse: ☐ Yes ☐ No Veteran's Name: \_\_\_\_\_

Branch of Service: \_\_\_\_\_ Dates of Service: \_\_\_\_\_ War Period: \_\_\_\_\_

Honorable Discharge: ☐ Yes ☐ No \*Are you currently receiving a VA Payment? ☐ Yes ☐ No

Veteran: Rating \_\_\_\_\_ Amount: \$ \_\_\_\_\_ Surviving Spouse Amount: \$ \_\_\_\_\_

Have you completed previous, will, trust or estate planning?? Yes No If yes, please check all of the boxes and specify the date for each document you have in your existing plan. Please provide copies if not with this office.

☐ Will \_\_\_\_\_ ☐ Power of Attorney \_\_\_\_\_ ☐ Living Will \_\_\_\_\_ ☐ Have you made any gifts/transfers within the past 5 years?  
☐ Trust \_\_\_\_\_ ☐ Health Care Power of Attorney \_\_\_\_\_ ☐ Long-Term Care Insurance \_\_\_\_\_

# PHYSICAL AND MENTAL ISSUES

Have you been previously or recently diagnosed with any physical ailment that affects your life expectancy or may result in a long-term care need? *If yes, please explain:*

☐ Yes ☐ No

Are you currently taking medication that might impair your mental faculties or abilities? *If yes, please explain:*

☐ Yes ☐ No

Have you been diagnosed with, or have symptoms of, mild cognitive impairment (MCI), dementia, or Alzheimer's disease? *If yes, please explain:*

☐ Yes ☐ No

Have you been diagnosed with or have symptoms of depression, anxiety, or mental illness? *If yes, please explain:*

☐ Yes ☐ No

Have you been diagnosed with a condition that effects your quality of life, like Lyme Disease or an autoimmune disorder? *If yes, please explain:*

☐ Yes ☐ No

Have you been diagnosed with or have symptoms a developmental disability/development disorder, or are on the autism spectrum? *If yes, please explain:*

☐ Yes ☐ No

Have you been diagnosed or have symptoms of substance misuse or other addiction like gambling? *If yes, please explain:*

☐ Yes ☐ No

# IMPORTANT FAMILY QUESTIONS

- 1.** Are you receiving social security, disability or other governmental benefits?

*If yes, please explain:*

☐ Yes ☐ No

- 2.** Are you making payments to a divorce or property settlement order?

*Please describe and provide a copy.*

☐ Yes ☐ No

- 3.** Have you ever been widowed?

*If a federal or state death/estate tax return filed please provide a copy.*

☐ Yes ☐ No

- 4.** Have you ever filed federal or state gift tax returns?

*Please provide copies.*

☐ Yes ☐ No

- 5.** Do you currently support any charities or are there any charitable beneficiaries you would like that you would like to include in your estate plan? *If yes, please describe:*

☐ Yes ☐ No

- 6.** Are there any provisions for your pets you would like to include in your plan?

*If yes, please describe:*

☐ Yes ☐ No

- 7.** Are you named as a beneficiary in anyone else's estate planning documents?

*If yes, please describe:*

☐ Yes ☐ No

- 8.** Do any children or grandchildren have special educational, medical or physical needs?

☐ Yes ☐ No

- 9.** Do any children or grandchildren receive governmental support or benefits?

☐ Yes ☐ No

- 10.** Do you provide primary or other major financial support to adult children, minor grandchildren, family members, or others? *If yes, please describe:*

☐ Yes ☐ No

# CHILDREN | GRANDCHILDREN | OTHER BENEFICIARIES | FAMILY MEMBERS

*REMINDER: Use full legal names (First Name, Middle Initial, Last Name) as you want them to appear in your legal documents.*

**1.** **Name** \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_  
Spouse's Name \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_  
Health or Other Concerns \_\_\_\_\_  
Home Phone \_\_\_\_\_ Bus Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_  
Identify their relationship to you: ☐ Child ☐ Adopted ☐ Foster Child Sex: M / F  
Other Relationship (Please specify whose/Grandchild, Niece, Nephew, etc.): \_\_\_\_\_  
Are They: ☐ Student ☐ Employed - Occupation \_\_\_\_\_  
Marital Status: ☐ Single ☐ Married ☐ First ☐ Second ☐ Other \_\_\_\_\_ How long? \_\_\_\_\_  
Children: ☐ None ☐ Yes How many? \_\_\_\_\_ Age(s) of their child(ren): \_\_\_\_\_  
Residential Address: \_\_\_\_\_  
Potential Problems/Hardships: \_\_\_\_\_

**2.** **Name** \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_  
Spouse's Name \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_  
Health or Other Concerns \_\_\_\_\_  
Home Phone \_\_\_\_\_ Bus Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_  
Identify their relationship to you: ☐ Child ☐ Adopted ☐ Foster Child Sex: M / F  
Other Relationship (Please specify whose/Grandchild, Niece, Nephew, etc.): \_\_\_\_\_  
Are They: ☐ Student ☐ Employed - Occupation \_\_\_\_\_  
Marital Status: ☐ Single ☐ Married ☐ First ☐ Second ☐ Other \_\_\_\_\_ How long? \_\_\_\_\_  
Children: ☐ None ☐ Yes How many? \_\_\_\_\_ Age(s) of their child(ren): \_\_\_\_\_  
Residential Address: \_\_\_\_\_  
Potential Problems/Hardships: \_\_\_\_\_

**3.** **Name** \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_  
Spouse's Name \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_  
Health or Other Concerns \_\_\_\_\_  
Home Phone \_\_\_\_\_ Bus Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_  
Identify their relationship to you: ☐ Child ☐ Adopted ☐ Foster Child Sex: M / F  
Other Relationship (Please specify whose/Grandchild, Niece, Nephew, etc.): \_\_\_\_\_  
Are They: ☐ Student ☐ Employed - Occupation \_\_\_\_\_  
Marital Status: ☐ Single ☐ Married ☐ First ☐ Second ☐ Other \_\_\_\_\_ How long? \_\_\_\_\_  
Children: ☐ None ☐ Yes How many? \_\_\_\_\_ Age(s) of their child(ren): \_\_\_\_\_  
Residential Address: \_\_\_\_\_  
Potential Problems/Hardships: \_\_\_\_\_



## CHILDREN | GRANDCHILDREN | OTHER BENEFICIARIES | FAMILY MEMBERS

**REMINDER:** Use full legal names (First Name, Middle Initial, Last Name) as you want them to appear in your legal documents.

**4.** Name \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_  
Spouse's Name \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_  
Health or Other Concerns \_\_\_\_\_  
Home Phone \_\_\_\_\_ Bus Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_  
Identify their relationship to you: ☐ Child ☐ Adopted ☐ Foster Child Sex: M / F  
Other Relationship (Please specify whose/Grandchild, Niece, Nephew, etc.): \_\_\_\_\_  
Are They: ☐ Student ☐ Employed - Occupation \_\_\_\_\_  
Marital Status: ☐ Single ☐ Married ☐ First ☐ Second ☐ Other \_\_\_\_ How long? \_\_\_\_\_  
Children: ☐ None ☐ Yes How many? \_\_\_\_\_ Age(s) of their child(ren): \_\_\_\_\_  
Residential Address: \_\_\_\_\_  
Potential Problems/Hardships: \_\_\_\_\_

**5.** Name \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_  
Spouse's Name \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_  
Health or Other Concerns \_\_\_\_\_  
Home Phone \_\_\_\_\_ Bus Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_  
Identify their relationship to you: ☐ Child ☐ Adopted ☐ Foster Child Sex: M / F  
Other Relationship (Please specify whose/Grandchild, Niece, Nephew, etc.): \_\_\_\_\_  
Are They: ☐ Student ☐ Employed - Occupation \_\_\_\_\_  
Marital Status: ☐ Single ☐ Married ☐ First ☐ Second ☐ Other \_\_\_\_ How long? \_\_\_\_\_  
Children: ☐ None ☐ Yes How many? \_\_\_\_\_ Age(s) of their child(ren): \_\_\_\_\_  
Residential Address: \_\_\_\_\_  
Potential Problems/Hardships: \_\_\_\_\_

**6.** Name \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Address \_\_\_\_\_  
Spouse's Name \_\_\_\_\_ Spouse's Occupation \_\_\_\_\_  
Health or Other Concerns \_\_\_\_\_  
Home Phone \_\_\_\_\_ Bus Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_  
Identify their relationship to you: ☐ Child ☐ Adopted ☐ Foster Child Sex: M / F  
Other Relationship (Please specify whose/Grandchild, Niece, Nephew, etc.): \_\_\_\_\_  
Are They: ☐ Student ☐ Employed - Occupation \_\_\_\_\_  
Marital Status: ☐ Single ☐ Married ☐ First ☐ Second ☐ Other \_\_\_\_ How long? \_\_\_\_\_  
Children: ☐ None ☐ Yes How many? \_\_\_\_\_ Age(s) of their child(ren): \_\_\_\_\_  
Residential Address: \_\_\_\_\_  
Potential Problems/Hardships: \_\_\_\_\_

## ADVISORS

Personal Attorney \_\_\_\_\_ Phone \_\_\_\_\_

Financial Advisor \_\_\_\_\_ Phone \_\_\_\_\_

CPA \_\_\_\_\_ Phone \_\_\_\_\_

Life Insurance Advisor \_\_\_\_\_ Phone \_\_\_\_\_

## FINANCIAL AND ASSET SUMMARY

This Organizer is designed to help you list all of the assets and property that you own and to approximate its fair market value.

If you do not own property or assets under a particular heading, please leave that section blank.  
If a section is insufficient for you to list all of your holdings, attach extra sheets to this Organizer.

**It is extremely important that you complete this Organizer as thoroughly and as accurately as you can. Our advice will be based upon the information that you provide us.**

### OWNERS/BENEFICIARIES AND ACCOUNT NUMBERS

How you own your assets is extremely important for purposes of properly designing and implementing your Family Estate & Legacy Plan. For each property please indicate how the property is titled. When doing so, please use the following abbreviations:

OWNER OF PROPERTY	USE
If an asset is held in your name alone w/ no other person (i.e. Sole Ownership)	S1
Joint Tenant with someone (i.e. child, parent, other)	JT0
If you cannot determine how the property is owned	?

**If you would like to bring supporting documentation to discuss, here is our suggested list:**

- Most Recent Bank, Brokerage, and Investment Statements
- Deeds and Property Records
- Documentation of Sole Proprietorships, Partnership, LLC, Corporate or Closely Held Business Interests
- Most Recent Life Insurance and Annuity Statements and Beneficiary Designations
- Most Recent Retirement Account Statements and Beneficiary Designations (401(k), IRA, 403(b), 457, TSP, SEP, etc.)
- Long-term Care Policy and Most Recent Benefit Statement

**See our checklist for convenience**

# PERSONAL FINANCIAL INFORMATION OVERVIEW

This Overview allows for a snapshot of your monthly income. It is very important to indicate how each income stream is legally owned and, if jointly owned illustrate attribution amounts in dollar form if possible.  
**\*\*DO NOT USE \$. Enter numbers & decimal only.\*\***

## MONTHLY INCOME (GROSS)

SOURCE	YOUR INCOME
Wages	
Pension	
Social Security	
Investments	
Other	
Total Value \$	

The above information is accurate as of \_\_\_\_\_.

## MONTHLY INCOME (NET)

SOURCE	YOUR INCOME
Wages	
Pension	
Social Security	
Investments	
Other	
Total Value \$	

The above information is accurate as of \_\_\_\_\_.

## REAL PROPERTY

List any interest in real estate including your family residence, vacation home, commercial property, vacant land, time share, etc.  
**\*\*DO NOT USE \$. Enter numbers & decimal only.\*\***

OWNER (please check one)

GENERAL	S1	JTO	YEAR	FAIR MARKET VALUE	COST BASIS	LOAN BALANCE
TOTALS						

## NOTES



## AUTOMOBILES, BOATS AND RV'S

For every vehicle please list the description, how titled, market value and outstanding encumbrance.

**\*\*DO NOT USE \$. Enter numbers & decimal only.\*\***

OWNER (please check one)				
GENERAL DESCRIPTION	S1	JT	FAIR MARKET VALUE	LOAN BALANCE
TOTALS				

## CASH ACCOUNTS (BANK, SAVINGS, CD & MONEY MARKET)

List each bank and savings account, including the institution and account number. For "type" use the following abbreviations: Checking Account "CA": Savings Account "SA": Certificates of Deposit "CD": Money Market "MM". Do NOT include IRA's, 401(k) or Retirement Accounts.

**\*\*DO NOT USE \$. Enter numbers & decimal only.\*\***

OWNER (please check one)				
NAME OF INSTITUTION	TYPE	S1	JT	BALANCE
TOTAL				

## NOTES

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STOCKS, BONDS & BROKERAGE ACCOUNTS

List any and all stocks, bonds & brokerage accounts you own. Lump all of the assets in each brokerage account into one line item. Only list individual stocks and bonds that you actually hold in certificate form. Do NOT include IRAs, 401(k) or Retirement Accounts.

**\*\*DO NOT USE \$. Enter numbers & decimal only.\*\***

OWNER (please check one)				
INVESTMENT	TYPE	S1	JT	BALANCE
TOTAL				

IRA, 401 (K) AND OTHER QUALIFIED RETIREMENT ACCOUNTS

This is where you list your IRA, 401(k), 403(b), 457, TSP, SEP, Pension and Retirement Plan Accounts. Lump account balances together. Give both the Owner and the named Primary Beneficiary of each Account. Provide any pertinent information that may not be asked.

**\*\*DO NOT USE \$. Enter numbers & decimal only.\*\***

OWNER (please check one)					
RETIREMENT ACCT. INSTITUTION	TYPE	S1	JT	BENEFICIARY	BALANCE
TOTAL					

## LIFE INSURANCE POLICIES & ANNUITIES

List all life insurance, indicate whether whole life, split dollar, group life or annuity. List the insurance company, type of policy, owner of the policy, beneficiary of the policy, who pays premiums, cash value and death benefit.  
**\*\*DO NOT USE \$. Enter numbers & decimal only.\*\***

INSTITUTION	WHO'S LIFE INSURED	TYPE	OWNER	BENEFICIARY	CASH VALUE	DEATH BENEFIT
TOTAL						

## CLOSELY HELD BUSINESS INTERESTS

Type: General and Limited Partnerships, LLCs, S Corporations, Sole Proprietorships, Privately owned companies, oil interests, land trusts, gas and oil interests. **Additional Information:** Give a description of the interests, who has the interest, other owners and estimated values.  
**\*\*DO NOT USE \$. Enter numbers & decimal only.\*\***

NAME OF THE BUSINESS	STATE ORGANIZED	TYPE	OWNERSHIP %	FAIR MARKET VALUE
TOTAL				

## MONEY OWED TO YOU

List any mortgages or promissory notes where someone owes you money solely or jointly.  
**\*\*DO NOT USE \$. Enter numbers & decimal only.\*\***

NAME OF DEBTOR	DATE OF NOTE	MATURITY DATE	OWED TO	CURRENT BALANCE
TOTAL				

Type: Gift or inheritances that you expect to receive at some time in the future; or moneys that you anticipate receiving through a judgment in a lawsuit.

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**List any other assets that do not fit into any other listed category.**

**OWNER (please check one)**

## NOTES

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# FINANCIAL AND ASSET SUMMARY

Total the net equity of all assets held by yourself or jointly with another individual or entity.

ASSETS	SOLE OWNER	JOINT OWNER	TOTAL VALUE
Real Property			
Furniture and Personalty			
Autos, Boats, RVs			
Cash, Savings, CDs			
Retirement Accounts (Qualified Accounts, i.e. IRAs, Roth IRAs, 401(k)s, 403(b)s, 457s, etc.)			
Brokerage Accounts			
Insurance and Annuities			
Closely Held Businesses			
Money Owed to You			
Inheritance, Gifts, etc.			
Other Assets			
TOTAL ASSETS			

*Please provide us copies of bank and brokerage statements, as well as deeds. We use those to accurately communicate with your financial advisors/institutions to properly “fund” any trust that you create.*

## NOTES

# LIABILITIES SUMMARY

Total the net equity of all liabilities held by yourself.

LIABILITIES	SOLE DEBTS	JOINT DEBTS	TOTAL VALUE
Real Property/Mortgage			
Loans Payable			
Other			
<b>TOTAL LIABILITIES</b>			

## MONTHLY LIVING EXPENSES

EXPENSES	TOTAL	EXPENSES	TOTAL
<b>MORTGAGE</b>		<b>TRANSPORTATION/PARKING</b>	
<b>RENT</b>		<b>CABLE TV/SUBSCRIPTIONS</b>	
<b>REAL ESTATE TAXES</b>		<b>TELEPHONE/CELL PHONE</b>	
<b>WATER</b>		<b>CAR INSURANCE/REPAIRS</b>	
<b>SEWER</b>		<b>GROCERIES</b>	
<b>UTILITIES</b>		<b>RESTAURANT/TAKE OUT</b>	
<b>HOMEOWNERS INSURANCE: INCLUDING FLOOD, WIND &amp; HAIL</b>		<b>ENTERTAINMENT</b>	
<b>HOA / POA</b>		<b>CLOTHING</b>	
<b>CONDO FEES</b>		<b>TRAVEL</b>	
<b>HOME MAINTENENCE</b>		<b>GIFTS</b>	
<b>MEDICAL COSTS</b>		<b>CHARITABLE GIVING</b>	
<b>HEALTH INSURANCE</b>		<b>MISC.</b>	
<b>LONG TERM CARE INSURANCE</b>		<b>TOTAL</b>	
<b>LIFE/DISABILITY INSURANCE</b>			
<b>INCOME TAXES</b>			

## OTHER LIABILITIES NOT OTHERWISE MENTIONED

List any other liabilities that do not fit into any other listed category.

OWNER (please check one)

DESCRIPTION	S1	JT	CURRENT VALUE



## TO BE COMPLETED BY YOU

Our objective is to assist clients in identifying their concerns and anxieties. All too often in the planning process, a client will discover that there are other, more pressing concerns than the one that prompted them to begin the planning process. Please review the following risks that we frequently hear from clients, identify those risks of which you are concerned, and provide us with some sense about how concerned you are with that particular risk. This information will assist us in focusing our conversations toward the issues that are the most pressing to you.

**1.** I want to authorize someone to act for me legally, if I cannot for myself.

☐ Yes ☐ No

**2.** I want to authorize someone to make my health-care decisions, if I cannot for myself. (Avoid Terri Schiavo Situation- I would like to provide that my death shall not be unnecessarily prolonged by artificial means or measures / God Power / HIPAA Compliant)

☐ Yes ☐ No

**3.** I want to be able to disinherit a family member of mine.

☐ Yes ☐ No

**4.** I want to set up Expanded Powers (blank check) / Positioning for crisis planning asset protection (limited instruction.)

☐ Yes ☐ No

**5.** Protect Assets for Disabled or At-Risk beneficiaries if needed after our/my death. Please answer "yes" or "no" for the items for below.

a. I'm concerned that my parents will need financial assistance if we were to die prematurely. *Planning for Parents*

☐ Yes ☐ No

b. I have an individual whom I'd like to benefit in my estate planning who has "special needs" and who is currently receiving or may in the future receive governmental benefits but who might lose eligibility if they inherit assets. *Special Needs Beneficiary / Disabled Adult Children*

☐ Yes ☐ No

c. I'm concerned that our children or other beneficiaries will lose any inheritance we might leave to them due to their mismanagement of the money and/or poor decision making. *Spend-Thrift / Fiscal Immaturity*

☐ Yes ☐ No

d. I have an individual whom I'd like to benefit in my estate planning but want to make sure inheritance money is being used to support them and pay for their care / restrictions if addictive behaviors persist. *At-Risk Beneficiaries (Addiction)*

☐ Yes ☐ No

e. I care for a minor and want to provide for them in my estate plan during incapacity and upon death. *Custodian of Minors*

☐ Yes ☐ No

f. I'm concerned that my children might not provide for my grandchildren's education which is very important to me. *Grandchildren's Education*

☐ Yes ☐ No



**6.** I am concerned about my beneficiaries arguing over control, money, residual relationship issues from childhood, commencing lawsuits (i.e. will contest) against each other because they feel they have received less than they should have received resulting in severed relationships long-term. *Deter Family Disputes*

☐ Yes ☐ No

**7.** I want to provide partial asset protection for my partner or my partner and beneficiaries of the decedent's property only (whoever dies first) after the death of the first of us but only if the survivor of us is disabled in the moment of the first death. (PROBATE REQUIRED).

NOT APPLICABLE

**8.** I want to provide asset protection for my children/beneficiaries (for their lives) to protect their inheritance from any of the below:

a. Creditors. I'm concerned that our children or other beneficiaries will lose any inheritance we might leave to them to their creditors, lawsuits, or bankruptcy.

☐ Yes ☐ No

b. Children-In-Law. I'm concerned about what might happen if a son-in-law or daughter-in-law ever got control over any inheritance we might leave to our children.

☐ Yes ☐ No

c. Failed Marriages/Divorce Protection/Predator Protection. I'm concerned about what might happen to a beneficiary's inheritance if he or she ever gets a divorce from his or her current or future spouse.

☐ Yes ☐ No

d. Beneficial tax treatment for my beneficiaries is important to me.

☐ Yes ☐ No

**9.** I want detailed instruction for my care during periods of wellness, disability and death; to provide detailed personal instructions for my loved ones (who gets what, when, how) (My rule book applies).

☐ Yes ☐ No

**10.** Privacy is important to me. I'm concerned that personal matters involving my family or my finances will become public knowledge and available to people I don't want seeing it, i.e. my business competitors, predators (defrauders/schemers/exploiters), dishonest persons and curiosity seekers.

☐ Yes ☐ No

**11.** I'm concerned about the unnecessary delays and costs that my estate will incur if my assets pass via a probate proceeding but I am willing to submit to probate to gain protection for my partner.

☐ Yes ☐ No

**12.** I want to provide advanced planning for my partner/beneficiaries regarding matters like:

a. We have assets such as IRA, 401(k) and ESOP accounts that still have significant income tax liability. *Income Taxes*

☐ Yes ☐ No

b. I have an asset that I'm thinking about selling and I'd like to know how I might reduce or eliminate any capital gains taxes that I might owe. *Capital Gains Tax Concerns*

☐ Yes ☐ No

c. I own a business and I currently have no plans for my disability and my death in the continued operations of that business. *Business Succession Planning*

☐ Yes ☐ No

d. I have assets comprised significantly of one or more assets that are not easily divisible (such as an operating business) and I'm concerned that disputes will arise relating to how the assets might be divided. *Hard-to-Divide Assets*

☐ Yes ☐ No



**13.** I want to protect my surviving spouse in case of accident, unforeseen illness, disability, nursing home, creditors, predators, financial exploitation, undue influence with enhanced asset protection for the survivor of us or the survivor and descendants regardless of disability of my surviving spouse (compare to 7)

NOT APPLICABLE



**14.** I want to provide asset protection for me during my life from creditors, predators, lawsuits, nursing home, etc.

☐ Yes ☐ No

# DISCUSSION POINTS

I am interested in discussing:

a. I own a corporation or limited liability company and I'm concerned that my personal assets may still be exposed to liabilities of the company because I've not held company meetings annually, kept minutes from those meetings, elected officers, etc.

☐ Yes ☐ No

b. I own a business but need to verify that my filings are up to date and accurate. Corporate filings with the Secretary of State.

☐ Yes ☐ No

c. I have a company and I'm concerned that the company might falter if I were to die unexpectedly because I don't currently have a business succession plan. Business Succession Plan #1.

☐ Yes ☐ No

d. I have a company and I'm concerned that I may pay too much tax when I ultimately sell or transfer ownership. Business Succession Plan #2.

☐ Yes ☐ No

e. I have a buy-sell agreement with the other owners of the company in which I'm involved but I have no idea if it's up-to-date or if the company will have to funds to buy out my interest if I were to die.

☐ Yes ☐ No

f. I have property owned as joint tenants with someone and I'm concerned that a creditor of that other person could take the entire property.

☐ Yes ☐ No

g. I have concerns that either myself or a beneficiary may owe a tax liability to the IRS or the State.

☐ Yes ☐ No

h. I would like to know my options for naming a charity both during my lifetime and at my death.

☐ Yes ☐ No

i. I want to provide advanced planning for my beneficiaries regarding matters like:

☐ Yes ☐ No

1) I have already transferred assets to my kids that I want to protect.

☐ Yes ☐ No

2) I have an estate valued beyond Federal/State limits.

☐ Yes ☐ No

Other: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



910-755-PLAN (7526)  
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