

INITIAL CONSULTATION CHECKLIST

TELL US ABOUT YOUR GOALS, OBJECTIVES, CONCERNS and ANXIETIES

Our mission is to assist our clients in identifying their goals, objectives, concerns and anxieties, and providing solutions to address them. As we go through the planning process, our clients often discover that there are more issues and concerns than the one that may have motivated them to contact us. The following are some concerns that we often hear from our clients. Please review them and identify those that concern you and check the box. This information will assist us in focusing our conversations toward the issues that are most important to you.

Family Concerns:

Is This A Concern?

Make sure my spouse has resources he/she needs.

Protect my children's inheritance if my spouse remarries.

Protect my children's inheritance if my spouse develops dementia/Alzheimer's.

Make sure my minor children have someone I want as their guardian.

Passing along my values (as well as my property) to my children.

Make sure provisions are in place for my assets to be used the way I want for the benefit of my children; to ensure that they are educated properly and that they will be motivated to be self-supporting and are not "spoiled" by inheriting money.

Make sure that the wealth my children inherit from me will not be lost in a divorce, bankruptcy or lawsuit.

Providing for a child with a disability.

Providing for a child with substance abuse problems.

Providing for a child who is irresponsible with money.

Providing for parents who may need financial assistance.

Avoiding potential disputes among my heirs.

Providing protection for my Grandchildren if their parents are deceased.

Is This A Concern?

Disability Concerns:

Make sure that someone has the ability to manage my affairs if I become incapacitated.

Make sure my spouse is protected if my spouse or I become incapacitated.

Make sure my estate is protected if my spouse becomes incapacitated.

Make sure that someone has the ability to make medical decisions for me if I am unable to make them myself.

Make sure my wishes with respect to my being removed from life support are honored.

Creditor Concerns:

Protecting my assets from potential lawsuits and other creditors.

Protecting my spouse, after my death, from lawsuits and creditors.

Post-Death Concerns

Reducing the costs of administering my estate after my death.

Reducing the taxes that might have to be paid upon my death and/or my spouse's death.

Keeping the administration of my estate private – and out of the public record.

Make sure I choose the people that will administer my estate.

Making it easier for my family to administer my affairs after my death.

Keeping my family business going after my death.

Make sure a family beach house, cottage or cabin stays in the family.

Make sure that certain family heirlooms pass to the people I want to receive them.

Support for certain favorite charitable organizations.

INITIAL CONSULTATION CHECKLIST

Please use this space to add any other goals, objectives, concerns or anxieties you may have which are not listed above:
