

YOUR GOALS AND CONCERNS WORKSHEET



We are about to lead you through a process that should provide you comfort and clarity during what is otherwise a very difficult time. Before we begin, completing this worksheet together gives us, your legal team, an opportunity to better understand your goals and concerns (an example is provided on the next page):

Name: _____ Date: _____

We hope that one year from today:

Brainstorm		Prioritize	
D The dangers or obstacles that stand in our way or otherwise worry us:		1	
		2	
		3	
O The opportunities that we hope our legal, tax and financial team can help us take advantage of:		1	
		2	
		3	
S The strengths that we have in place now that will help us along the way:		1	
		2	
		3	

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Name: YOUR NAME HERE Date: TODAY'S DATE

We hope that one year from today: DAD'S ESTATE ADMINISTRATION IS HANDLED SMOOTHLY, OPPORTUNITIES ARE EXPLORED AND UTILIZED, AND THE FAMILY CAN REST ASSURED THAT MOM'S FUTURE IS SOLID.

Brainstorm		Prioritize	
D The dangers or obstacles that stand in our way or otherwise worry us: <u>ENOUGH INCOME FOR MOM TO LIVE</u> <u>MINIMIZE INCOME & ESTATE TAXES</u> BROTHER CHALLENGING WILL/TRUST ASSETS NOT FROZEN DURING ADMIN <u>MINIMIZE BENEFICIARY DISPUTES</u> MEDICAL BILLS INVESTMENTS - RIGHT PORTFOLIO?		1	MAKE SURE INVESTMENTS GENERATE SUFFICIENT INCOME TO RETAIN MOM'S STANDARD OF LIVING
		2	MINIMIZE ESTATE AND INCOME TAXES
		3	COMMUNICATE WITH BENEFICIARIES TO MINIMIZE POTENTIAL DISPUTES BETWEEN THEM
O The opportunities that we hope our legal, tax and financial team can help us take advantage of: <u>STEP-UP IN TAX BASIS-CAPITAL GAINS ELIMINATED</u> ROLL-OVER OF IRA <u>TRUST PROTECTS BENEFICIARIES</u> <u>DOWNSIZE HOUSE FOR MOM</u> UPDATE ESTATE PLAN		1	TAKE ADVANTAGE OF STEP-UP IN TAX COSTS BASIS TO ADJUST PORTFOLIO CAPITAL GAINS TAX FREE
		2	ESTABLISH MARITAL TRUST TO PROTECT MOM
		3	MOVE MOM INTO BETTER PLACE- EASIER TO GET AROUND & CLOSER TO GROCERY/RESTAURANTS
S The strengths that we have in place now that will help us along the way: SOLID FAMILY- GET ALONG <u>SUFFICIENT SAVINGS TO TAKE CARE OF MOM IN HER STANDARD OF LIVING</u> <u>GREAT TEAM OF PROFESSIONALS</u> <u>ESTATE PLAN FIRST RATE!</u>		1	ESTATE HAS SUFFICIENT RESOURCES TO TAKE CARE OF MOM FOR REST OF LIFE
		2	LEGAL, TAX AND FINANCIAL TEAM IN SYNC WITH US AND EACH OTHER
		3	DAD HAD A GREAT ESTATE PLAN- JUST NEED TO ADMINISTER ACCORDING TO PLAN

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