



GOODMANLAWSM

Advice, Assistance, Alacrity



www.goodmanlaw.com

info@goodmanlaw.com

ESTATE PLANNING CHECKLIST

When you come to the lawyer's office to discuss estate planning, please be prepared to discuss the following:

1. What should happen to your assets upon your death (should they go to your spouse or if the spouse has predeceased you in equal shares to your children)?
2. What should happen to your minor children (if any) upon your death (who should be appointed to take care of the children and raise them)?
3. Who do you want to administer your estate (follow the directions in your Will, pay your debts, file your tax returns and distribute your assets)?
4. If you are disabled or incapacitated (but not dead), who should handle your financial affairs?
5. If you are disabled or incapacitated (but not dead), who should make medical treatment decisions concerning you?
6. If the person you have selected to administer your estate, or handle your financial affairs while you are alive, is not able to do so, who do you want as an alternate?
7. Do you want to be kept alive artificially (on a respirator)?
8. Do you want to make a donation of all or any of your organs?

You should bring ALL of the following with you to the appointment:

1. Every prior Will and power of attorney you have made;
2. A copy of the deed to your house (if available);
3. Information about EVERY life insurance policy on you and your spouse;
4. A list of the names, addresses, dates of birth and Social Security Numbers (if available) of all children, if any;
5. A summary of the assets you own including your estimate of the value of each major item (house, cars, bank accounts, IRA/401(k), stocks & bonds, etc.).