

FINANCES AND YOUR ESTATE CHECKLIST

My will is current and will distribute my assets based on my wishes.

I am satisfied with the size of my after-tax estate.

My estate will have adequate liquidity to pay taxes and meet other financial obligations.

Arrangements have been made to manage my affairs should I become incapacitated.

I would be open to ideas that would increase the size of my estate.

I am concerned about the possible action of creditors against my estate.

I would like to know of an effective way of making donations to a charity.

My health and that of my spouse is good.

I would be interested in considering ideas that could eliminate taxes on assets destined for my heirs.

I have capital assets that I would like to pass on to my heirs free of tax and debt.

I am concerned about my ability to finance healthcare costs for an extended period of time, should I need it.

I would like to know how to benefit from creditor protection.