

THINGS TO CONSIDER BEFORE OUR NEXT MEETING:

Please complete this form and bring it with you to our next meeting.

In the questions that follow, please enter at least two choices for each. The choice of entering a third is optional.

- ❖ If you have minor children, who would you like to appoint as guardian in the event of your death?

First Choice: _____

Second Choice: _____

Third Choice: _____

- ❖ If you are disabled or incapacitated and unable to carry out your Trustee duties, who would you like to appoint to act as Successor Trustee? For a Successor Trustee, it may be good to consider a trusted advisor or professional fiduciary.

First Choice: _____

Second Choice: _____

Third Choice: _____

- ❖ Upon your death, who would you like to appoint to act as Successor Trustee? Again, it may be good to consider a trusted advisor or professional fiduciary.

First Choice: _____

Second Choice: _____

Third Choice: _____

- ❖ If you are incapacitated and unable to make your own health care decisions, who would you like to name as Agent to make those decisions for you? Since this Agent will likely be contacted on an emergency basis, it is good to provide as many phone numbers as possible. Usually the First Agent is your spouse.

Husband

First Agent Name: _____

Address: _____

Home Phone: _____

Cell Phone: _____

Work Phone: _____

Second Agent Name: _____

Address: _____

Home Phone: _____

Cell Phone: _____

Work Phone: _____

Third Agent Name: _____

Address: _____

Home Phone: _____

Cell Phone: _____

Work Phone: _____

Wife

First Agent Name: _____
Address: _____
Home Phone: _____
Cell Phone: _____
Work Phone: _____

Second Agent Name: _____
Address: _____
Home Phone: _____
Cell Phone: _____
Work Phone: _____

Third Agent Name: _____
Address: _____
Home Phone: _____
Cell Phone: _____
Work Phone: _____

- ❖ There are several ways to distribute your assets after your death. The first you should consider is any specific gift of cash or gift of a specific item, i.e. grandfather's antique pocket watch.

The next thing you should consider is how you want your assets distributed after you both pass away.

- Consider whom you would like to name as beneficiaries (either individuals or charities) and what percentage they should each get.
- Consider if you would like an age restriction on when they would receive the trust assets.
- Consider if any beneficiary has a special need (disability or addiction can create this need)
- Consider if you would like them to receive the distribution outright or if it should remain in trust (which provides protection of the trust assets from creditors and divorcing spouses, as well as keeps the assets outside of the beneficiary's estate for estate tax purposes).

How do you want your assets distributed if your named beneficiaries should predecease you?

- ❖ Outline any family issues or conflicts that exist.
- ❖ Do you have any children or grandchildren with special needs (permanent disability or addiction issues) that you would like to make provision for?