



Question	Example Responses
<p>1 What is your desired legacy?</p>	<ol style="list-style-type: none"> 1. Financial security for future generations. 2. Charitable contributions and philanthropic impact. 3. Preservation of family traditions and values. 4. Creation of a family foundation or trust. 5. Establishing educational scholarships.
<p>2 What specific goals do you wish to achieve with your estate plan?</p>	<ol style="list-style-type: none"> 1. Minimizing estate taxes. 2. Avoiding probate and ensuring a smooth transfer of assets. 3. Providing for the financial needs of your spouse and children. 4. Protecting assets from creditors or lawsuits. 5. Preserving family wealth and minimizing the risk of squandering.
<p>3 How do you envision the distribution of your assets among your beneficiaries?</p>	<ol style="list-style-type: none"> 1. Equal distribution among all beneficiaries. 2. Providing for specific needs or circumstances of each beneficiary. 3. Designating a primary beneficiary with contingency plans for alternate beneficiaries. 4. Creating a trust to manage and distribute assets over time. 5. Considering the age and financial responsibility of beneficiaries in determining the distribution.
<p>4 Have you considered any charitable giving or philanthropic endeavors as part of your plan?</p>	<ol style="list-style-type: none"> 1. Donating a percentage of your estate to specific charities or causes. 2. Establishing a charitable foundation or trust to support ongoing philanthropy. 3. Naming charities as beneficiaries of certain assets. 4. Setting up a donor-advised fund for family involvement in charitable giving decisions. 5. Exploring opportunities for impact investing to align your estate with your philanthropic goals.
<p>5 Are there any specific family considerations or concerns you would like to address in your plan?</p>	<ol style="list-style-type: none"> 1. Providing for the financial needs of minor children or dependents. 2. Addressing potential conflicts among family members or beneficiaries. 3. Ensuring the care and financial support of disabled or special needs family members. 4. Balancing the interests of a blended family or multiple marriages. 5. Appointing guardians for minor children or dependents.
<p>6 Have you thought about potential tax implications and how to minimize them?</p>	<ol style="list-style-type: none"> 1. Establishing a revocable living trust to avoid probate and potential estate taxes. 2. Making use of lifetime gift tax exemptions to transfer assets during your lifetime. 3. Utilizing tax-efficient strategies such as charitable remainder trusts or family limited partnerships. 4. Considering the impact of state and federal estate taxes on your assets. 5. Seeking professional advice from an estate planning attorney or tax specialist.
<p>7 How can your heirs best honor your vision and goals as the executor of your estate?</p>	<ol style="list-style-type: none"> 1. Implement your estate plan faithfully. 2. Communicate effectively with beneficiaries. 3. Seek professional guidance when needed. 4. Preserve and protect estate assets. 5. Maintain impartiality and fairness in asset distribution.