

ESTATE PLANNING APPOINTMENT CHECKLIST

HOW TO PREPARE FOR YOUR CONSULTATION

SELECT YOUR REPRESENTATIVES

Whether you choose to have a Will, a Trust or both, you will need to select representatives for your estate. Upon your death or incapacitation, your representatives will be trusted to make decisions for you and your assets. These representatives include: an executor, trustees, and powers of attorneys for medical and financial dealings.

CONSIDER YOUR BENEFICIARIES AND/OR LEGACIES

Consider who you would like to receive your assets. Many people choose their children or other close family members to receive their assets, but you have the power to choose whomever you would like. You could also consider charities or organizations to donate your assets to. These could be churches or other organizations close to your heart.

CONSIDER GUARDIANSHIP OPTIONS OF CHILDREN

Do you have children in your household under the age of 18? If so, you will need to consider guardianship options in the event of your death or incapacitation. Choose someone who is willing, capable of raising your children, and trustworthy.

MAKE A LIST OF YOUR ASSETS & DEBTS

Making a list of your assets and debts will help you and your attorney determine the most beneficial pathway for your estate. Be sure to include real estate, vehicles, bank accounts, life insurance, retirement accounts, stocks, bonds and brokerage accounts. Don't forget your debts on your list! Examples include auto loans, mortgages, home equity lines of credit and other debts.

GATHER YOUR INFORMATION

Gather your asset and debt information for your attorney. Include items such as: bank statements, investment statements, recent tax returns, deeds to property, real estate tax bills and more.

SCHEDULE YOUR CONSULTATION

Do not delay! Too many people put off getting their estate plan in order and are subject to the state legislation determining their fate. Call today for your estate planning consultation.

608.448.3680 - WWW.RUSSELLAWWI.COM

