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Checklist:

Preparing For An Estate Plan

- ☐ Your goals
- ☐ List of assets and liabilities
- ☐ Use of living trust
- ☐ Will
- ☐ Life insurance
- ☐ Jointly-held property
- ☐ Gift program
- ☐ Treatment of pension plan, IRA
- ☐ Bequests of household goods
- ☐ Bequests of cash
- ☐ Division of remainder of estate
- ☐ Estate tax estimate
- ☐ Consideration of charitable gifts
- ☐ Choose trustee and executor
- ☐ Guardians for minor children
- ☐ Trusts for minor children
- ☐ Choose agent under powers of attorney