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Preparing for Estate Planning

Congratulations on looking ahead to put these important documents in place! It is my privilege to assist you in this preparation.

While you do not need anything to be prepared for our meeting, here are some topics to consider and information to bring with you!

Topics for you to consider:

- Tell me about your family – what are you most proud of? What are you worried about?
- What are the possibilities for your family in the next five years? Ten years?
- What do you hope for your kids or family?
- What are your goals in retirement? Anything you want to accomplish?
- Are you involved with or support ministries or non-profits?
- Are there people or things that you are responsible for?
- Do you have a giving or gifting plan?
- What would you like to leave to your kids or family? Do you have any worry this would harm them?
- What would you like to leave to ministries, non-profits or any other gifts or giving?
- What is most important to you when creating an Estate Plan?

Logistics:

- If you have any current documents such as Trust, Last Will & Testament or Powers of Attorney – please bring them
- Please bring a list of assets including Home, Real Property, Life Insurance, Investment or Retirement Accounts, Bank Accounts
- Name of Financial Advisor
- Name of CPA
- Full legal names, dates of birth, address and phone for family members and agents

Please consider taking advantage of our YouTube Channel that has helpful videos that can help educate and prepare you for creating an Estate Plan:

https://www.youtube.com/@EstatePlanningTexas

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