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— LAW —

Estate Planning Questions to Ask Your Clients

1 Current Estate Planning Documents

- Do you currently have any estate planning documents in place, such as a will, trust, power of attorney, or healthcare directive?

2 Beneficiaries for Non-Probate Assets

- Have you identified beneficiaries for all non-probate assets (Retirement accounts, life insurance, bank or investment accounts)?

3 Beneficiaries for Other Assets

- Who are your intended beneficiaries for other assets, such as real estate or business interests?

- How would you like your assets to be distributed among them?

4 Appointment of Executor/Trustee

- Who would you like to appoint as the executor of your will and/or trustee of any trusts you may establish?