APPENDIX C
Estate Planning Checklists

I. OBJECTIVES CHECKLIST

To determine client's main objectives for estate plan and the relative importance of each of these objectives.

A. Objectives for Client and Client's Spouse

1. Personal care during disability or old age
2. Managing assets during disability or old age
3. Securing advice for current management of assets
4. Minimizing current income taxes
5. Arranging for guardians for any of the client's minor children
6. Arranging for disposition or continued management of family business after disability, retirement or death
7. Changing residence to another jurisdiction—double domicile problems
8. Making gifts to family members
9. Establishing asset management for children
10. Providing financial care for client's parents
11. Insuring that family assets remain in family
12. Making gifts to charities
13. Purchasing additional life insurance
14. Purchasing insurance to supplement income in case of disability
15. Concern for health care decisions if gravely ill
16. Concern for funeral arrangements and donation of bodily organs
17. Minimizing estate and inheritance taxes and administration expenses at death

B. Objectives under Client's Will

1. Selection of executor, trustee and successor fiduciaries
2. Disposition of valued personal effects to spouse
3. Disposition of valued personal effects to children, other family members or friends