

ESTATE GOALS AND CONCERNS

On a scale of 1-5, how important are the following goals to you, 1 being unimportant and 5 being imperative.

Providing for your spouse.....	1	2	3	4	5
Leaving a legacy for your children.....	1	2	3	4	5
Leaving a legacy for your grandchildren.....	1	2	3	4	5
Providing for your children's education.....	1	2	3	4	5
Providing for your grandchildren's education.....	1	2	3	4	5
Avoiding estate and other taxes.....	1	2	3	4	5
Providing for a charitable organization.....	1	2	3	4	5
Insuring against the sale of family assets. (e.g., real estate, family heirlooms).....	1	2	3	4	5
Insuring that particular assets are received or not received by specific beneficiaries.....	1	2	3	4	5
Providing for a handicapped, disabled, or spendthrift beneficiary.....	1	2	3	4	5
My other estate goals are _____					

On a scale of 1-5, how concerned are you with the following questions, 1 being not worried and 5 being very worried.

Are you worried that your beneficiaries/beneficiaries' spouses will not use their inheritance in a way that you feel is right?.....	1	2	3	4	5
Are you worried about creditors interfering with the transfer of your estate?.....	1	2	3	4	5
Are you worried your estate will not provide for your spouse in the manner they are accustomed?.....	1	2	3	4	5
Do you worry about whether you should gift during life or after death?.....	1	2	3	4	5
Are you worried about splitting an asset that is difficult to divide? (e.g., real estate, family heirlooms).....	1	2	3	4	5
Are you worried your beneficiaries will contest your wishes or your PR's authority?.....	1	2	3	4	5
I am also worried about _____					

