

TOOL for ESTATE PLANNING ATTORNEY

Your estate plan covers how many heirs? _____

Heir Name (#)

	1	2	3	4	5	6
1) Mark which heirs do NOT NEED money.						
2) Mark which heirs REALLY NEED money.						
3) Which heirs are VERY GOOD with \$ management?						
4) Which heirs are TERRIBLE with \$ management?						
5) Do you have any heirs with special needs?						
6) Do you have any heirs that should not receive an inheritance?						

Charitable Giving

1) What are the top 5 Charitable Organizations you have given money to and for which you received a tax benefit?

- a) _____
- b) _____
- c) _____
- d) _____
- e) _____

2) From which Charitable Organizations has your family or someone you know received benefits?

- Church Boy/Girl Scouts YMCA/YWCA Heart Assoc.
 Cancer Society Hospice CPR/RedCross Scholarship Fund
 Other _____

3) Leaving a little money to a community benefit organization or charity in your estate plan has some benefits. Passing values to heirs with money, leaving a proud legacy, memorializing yourself or a loved one, giving back, expressing gratitude, tax benefits

Would you like to hear about those benefits? ____ (Y) ____ (N)

4) Are there any specific gifts you want to come off the top prior to everything going to the kids? Examples: siblings, charities that are near and dear to your heart or something for your pets.