

**By Matthew Crider, JD  
Family Wealth Protection Attorney**

The death of a parent...

Medical issues...

Birth of a child...

A milestone birthday...

Any of these events can trigger the urge to put your affairs in order and plan your estate.

One of the best things you can do for your loved ones is to leave them an estate that's well organized, clear cut and easy to administer.

While we talk often about the need for a sound estate plan, we know that trying to plan your estate can be overwhelming, especially if the need for planning was triggered by a traumatic event.

Making a list can help you get a handle on what you need to do and what your attorney will need to make the process easier for everyone.

This checklist will give you a good idea of what you need to take to your meeting with your estate planning attorney:

Make a complete list of all your assets and liabilities. Include how much you pay on any notes and when the payments are due.

Include information about assets that are not cash assets or securities (things like real estate, vehicles, boats, etc.) Make note of where the asset is located and whether it's in your name or if it's owned jointly with your spouse or another party.

Make list of the names, ages and addresses of all family members and friends who will be beneficiaries in your estate.

Bring a copy of your current will (if you have one) to your attorney's office so they can have a copy of it.

Make a complete list of the current balances of any employee benefits plans like 401(k)'s and IRA's and the beneficiary designations on each account.

If you've made cash gifts to any of your beneficiaries, bring copies of any gift tax forms filed.

If you've been divorced, adopted a child, or are currently separated, bring copies of any important documents.

Bring copies of deeds of ownership for real estate.

If possible, outline how you want your property to pass in each of the following situations:

If you die before your spouse

If your spouse dies before you

If one or more of your children dies before you

If you die before your mother or father and the survivor may need financial assistance

Things to Think About

Aside from getting paperwork in order, there are certain scenarios you need to consider and prepare for.

Here are a few examples:

If you and your spouse die at the same time:

How old should your children be before you make property available to them without restriction?

Who do you want to designate as guardians of your children? If your chosen guardian(s) become unable to care for your children, whom would you want to succeed them?

Are there any charities you want to name in your estate plan? If so, what do you want to leave them?

Make a list of any personal property you want to go to specific individuals and any other special considerations you want to plan for. This is a very important step for keeping

peace within the family after your death. Just telling someone they can have something isn't enough.

Who do you want to appoint as executor of your estate. Your executor is responsible for distributing your assets the way you want them distributed. Ask your attorney for advice on making a good choice.

We hope this list gives you a good idea of what you need to bring to your appointment with your estate planning attorney and the decisions you need to consider beforehand. Getting as much of the prep work as possible out of the way before your appointment will make for a more efficient use of your time and your attorney's.

Call us and we'll talk about any questions you have about getting prepared.

Schedule your Family Wealth Planning Session today. Our Family Wealth Planning Session is normally \$500, but this month I've made space for the next two people who mention this article to have a complete planning session with me at no charge. Call today and mention this article.

## About Matthew Crider, J.D.

Matthew Crider formed [Crider Law PC](#) in 1999 so he could help individuals and business owners by providing creative solutions and be their trusted advisor and legal counselor. He serves his clients by listening closely to their goals, dreams and concerns and working with them to develop superior and comprehensive estate and asset protection plans. His estate planning practice focuses on preserving and growing wealth by providing comprehensive, highly personalized estate planning counsel to couples, families, individuals and businesses.

