FOUNDATIONAL
WEALTH ADVISORY
A Member of Advisory Services Network, LLC

Planning Issues Beyond Federal Estate Tax Planning.

1. Will – Do you have one? How long has it been since it's been updated?
2. Financial POA – Do you have one? Is the agent still living?
3. Healthcare POA – Do you have one? Is the agent still living? Is it effective in your current state of residence?
4. Living Will – Do you have one? Is it effective in your current state of residence?
5. Trust or no Trust (Probate) – Is probate a concern for you?
6. Revocable Trust vs. Irrevocable Trusts
7. Spendthrift provisions – Will a beneficiary of your estate require "an adult in the room"?
8. Bloodline: Thinking it through (who gets the money?)
9. Creditor Protection
10. Defending the Surviving Spouse from Family
11. Provision for Children with Special Needs
12. Charitable Giving of/from your estate
13. Life Insurance: Is there still a need?
14. 529 Plans in your planning vs UTMA
15. SECURE Act Issues
16. Patriot Act Issues
17. Preparing your children
18. Preparing your spouse
19. Preparing Yourself
20. Dying with Dignity

This material is provided as a courtesy and for educational purposes only. Please consult your investment professional, legal and/or tax advisor for specific information pertaining to your situation.

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