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. Ex-spouse protection
11. Special needs provisions
12. Dying with Dignity
13. Charitable Giving of/from your estate
14. Life Insurance: Is there still a need?
15. 529 Plans in your planning
16. UTMA
17. Preparing your spouse
18. Preparing your children
19. Patriot Act Issues
20. Preparing Yourself

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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