

Agenda for Discussion

List Planning Objectives

	Level of Importance		
	High	Medium	Low
1. Getting the estate in order	_____	_____	_____
2. Probate avoidance	_____	_____	_____
3. Death tax reduction	_____	_____	_____
4. Care of children after death	_____	_____	_____
5. Transferring the business	_____	_____	_____
6. Providing sufficient cash flow	_____	_____	_____
7. Covering risk exposure	_____	_____	_____
8. Retirement planning	_____	_____	_____

Specific Areas Which Need Current Review

1. ___ Present wills and trusts
2. ___ Insurance program
3. ___ Current investments
4. ___ Fringe benefit package
5. ___ Business agreements
6. ___ Gifting program
7. ___ Disability income
8. ___ Long-term care
9. _____
10. _____
11. _____
12. _____