

## QUESTIONS TO CONSIDER PRIOR TO OUR MEETING

During our Estate Planning meeting there will be several questions which we will need to resolve and have answers to, some of which you may have never considered and some of which are very tough decisions to make.

I recommend prior to our meeting you sit down and give some thought to the following questions and considerations and/or consider who in your life you would want to fill these certain positions or offices.

1. Other than your spouse, who in your life would you trust to manage your assets and be responsible for all of your legal and financial obligations?
2. Other than your spouse, who in your life would you trust to make decisions regarding your health, including making emergency medical decisions and/or decisions on whether or not to resuscitate or to terminate life support?
3. Who in your life would you want doctors to be able to speak to about your medical condition if you were unable to communicate to these individuals directly?
4. If you have minor children, whose home would you want these children to live in? Who would you want managing the assets which are left for these children? (This does not need to be the same person).

We will need to have specific answers to these questions at the time of our estate planning meeting. Some of these questions are not easy and I am happy to provide some guidance based upon my experience in working with and appointing fiduciaries, as well as dealing with incapacity and end of life decisions. While these decisions may be arduous, the peace of mind of knowing who is going to be managing your assets, if and when you become incapacitated, or managing the assets of your beneficiaries upon your passing, will give you peace of mind for years to come.