

Planning for the future is a crucial step in securing your assets and ensuring your wishes are honored. One of the crucial steps in this journey is creating a comprehensive estate plan. By not taking the time to create your own estate plan, you risk allowing the state to determine how your hard-earned assets will be distributed. This document aims to help you gain control of your assets by guiding you through the estate planning process, offering valuable insights, and providing a list of essential questions to consider before meeting with an attorney.

Before sitting down with an attorney to create your estate plan, consider the following questions:

- > Who do I want to receive my assets?
- > Who would I want to make financial decisions for me if I couldn't make my own?
- > Who would I want to make to make health decisions for me if I couldn't make my own?
- > Do I want to support any charities?
- > Who do I want to administer my estate?

Once you've pondered the questions above and are ready to proceed, here is a list of essential information you should bring to your initial estate planning meeting with your attorney:

- A family tree (including names, ages and professions) to identify all descendants or other family members you want to benefit (and any you don't want to include)
- A personal financial statement (or a list of assets and liabilities with approximate values)
- List how each asset is owned (individually, joint with rights of survivorship, etc.) and any beneficiary designations.
- All life insurance policies (including cash value and face amount)
- Any contracts or agreements affecting property rights (marital agreements, property settlement agreements, beneficiary designations and business agreements)
- Any existing Will or other testamentary document directing the distribution of an asset upon your death

Embrace this opportunity to secure your legacy, and let us support you in crafting an estate plan that reflects your values and wishes. If you're ready to get started and you're ready to choose to plan, contact attorney Ryan Farley at 316-631-3163.