



CONVENTUAL FRANCISCAN FRIARS
PROVINCE OF OUR LADY OF CONSOLATION
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Sample Estate Planning Road Map

Before I visit an attorney

1. Budget for an attorney visit – 1 hour –Inquire about a form or template they might have when preparing for my will.
2. Write down what legacy I want to leave for generations to come.
3. What are my specific Burial/Funeral instructions once I die?
 - a. What to do with my remains or where will my remains be placed?
 - i. Prepurchase plot information
 - b. Funeral Service
4. List my top 5 Charities for Will.
 - a. Let the children know in the event they would like to pass on part of their inheritance to these
5. List of Heirs = in the Will – Any other legal paperwork: Beneficiary
6. Choose my executor and ask if they are okay with being my executor
 - a. List of Legal Teams they can use if they don't want to find one of their own
7. List all of my assets

Asset	Beneficiary	Details: Descriptions or Other Owner
Home		
Car 1		
Car 2		
IRA		
401K		
Checking account 1		
Checking account 2		
Savings account 1		
Savings account 2		
HSA 1		
HSA 2		
Life Insurance 1		
Life Insurance 2		

8. List all of my debts

Debt	Account	Details: Descriptions or Other Owner
Credit Card 1		
Credit Card 2		
Credit Card 3		

Credit Card 4		
Credit Card 5		
Auto Loan		
Mortgage		
Credit Card 1		
Credit Card 2		
Credit Card 3		
Credit Card 4		
Credit Card 5		
Auto Loan		
Student Loans		

9. Ask my children for their apartment information and list of assets or things they want to have given back to other people or to other people
10. Everything that is in my name only or doesn't have an assigned beneficiary is covered by the Will
11. List items in our house that we want to make sure goes to the right person at our death and also a photo of them
 - a. Make sure the list is handwritten: I will type it first and then hand write it out so I can have it in alphabetical order
 - b. What is from Mark's side of the family and what is from mine
 - c. Note that it really doesn't have to stay in the family just that we want them to know
12. Original Will and Lists/other Legal Paperwork in Waterproof Safe
 - a. Copies to: Each Child, Mother and Father

Note: 11.25 Mill + federal estate tax exemption and above is the only thing I have to worry about paying taxes on so right now...I am okay!

1. Keep an eye on future years to see if Congress lowers the exemption amount
2. Indiana has no inheritance tax but living in other states may be different
3. Ask tax advisor about effect of accrued income taxes on estate and beneficiaries