

ESTATE PLANNING GOALS

Circle Your Choice

"Protection of Assets" Planning:

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| 1. There are 80 million lawsuits filed every year; would you like to PROTECT YOUR ASSETS from lawsuits, bankruptcies, financial problems and malpractice claims? | YES | NO |
| 2. Do you want to protect the inheritance if your surviving spouse REMARRIES or is SUED ? | YES | NO |
| 3. Do you want to protect the inheritance if your children have a lawsuit, divorce, bankruptcy, financial problems, bad habits ? | YES | NO |

"Incapacity" Planning:

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| 1. Have you updated your documents for HIPAA ? | YES | NO |
| 2. Would you like to arrange for " FINANCIAL " decision-making without court supervision, bonding, annual accounting and attorney fees? | YES | NO |
| 3. Would you like to arrange for " MEDICAL " decision-making without family confusion and personal liability of your decision-maker? | YES | NO |
| 4. In the event of TERMINAL ILLNESS , would you like to eliminate the emotional distress and confusion and leave a directive to your family and doctor not to place you on a life-support | YES | NO |

"Death" Planning:

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| 1. Do you want your Estate to go through PROBATE and its publicity, expense and time delays ? | YES | NO |
| 2. Do you own Real Estate outside of Texas ? | YES | NO |
| 3. Is the possibility of ACCIDENTAL DISINHERITANCE of your children or spouse a concern? | YES | NO |

"Taxation" Planning:

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| 1. If your estate is over \$1,000,000 (Year 2013) , are you concerned that the federal government will unduly tax your assets at a rate of 55% (2013) ? | YES | NO |
| 2. Would you like to AVOID CAPITAL GAINS TAX ? | YES | NO |
| 3. Are you looking for more INCOME TAX DEDUCTIONS ? | YES | NO |
| 4. Would you like to begin a GIFT PROGRAM in favor of Children, Grandchildren or Charities? | YES | NO |