

YOUR ESTATE PLANNING GOAL WORKSHEET

UPDATED JUNE 2016

Every person has a number of goals that they wish to carry out through their estate plan. Sometimes your full range of goals can be easily accommodated, and sometimes it is necessary to prioritize objectives, and plan strategically to most effectively satisfy your highest priorities and philanthropic passions.

Listed below are several common goals. Use this worksheet to identify how important these goals are to you and your family. If you have a spouse, they should complete a separate worksheet, which can provide the two of you with the opportunity to compare and discuss what is most important to each of you.

GOAL RANKING (1-5 WITH 1 BEING THE MOST IMPORTANT)

Provide for your surviving spouse	1	2	3	4	5
Provide for your children during minority	1	2	3	4	5
Name a guardian for minor children	1	2	3	4	5
Ensure children's higher education is paid for	1	2	3	4	5
Ensure your estate passes to your descendants if your spouse were to remarry	1	2	3	4	5
Provide additional funds to adult children	1	2	3	4	5
Provide for grandchildren	1	2	3	4	5
Provide for other family members (describe below)	1	2	3	4	5
Create a charitable legacy (describe below)	1	2	3	4	5
Ensure the health of your community	1	2	3	4	5
Reduce estate taxes	1	2	3	4	5
Increase current income	1	2	3	4	5
Protect against liability	1	2	3	4	5
Sell appreciated assets tax free	1	2	3	4	5
Plan for business succession	1	2	3	4	5
Avoid probate (or multiple probates)	1	2	3	4	5
Other Goals:					
