



Estate Planning Preparation Tips

Selecting an Attorney:

If you aren't sure who to go to for estate planning help, consider these criteria in selecting an attorney.

- Ask for referrals from people you trust
- What percentage of the lawyer's practice is dedicated to estate planning?
- What is their fee structure?
- What is their timeline to complete the documents you will need?
- Are they a member of BETTR (Business, Estate, Tax, Trust, and Real Property) Group?
- Are they members of the American College of Trust & Estate Counsel (ACTEC)?

Steps you can take before you see an attorney to minimize cost and get the most out of your consultation:

- **Objectives:** Define goals for yourself and your giving.
- **Assets:** Develop a complete inventory of your assets including estimated values (bank accounts, investments, life insurance, retirement plans, real property, personal property). If you have listed specific beneficiaries for any of those assets, include that information as well.
- **Debts:** Create a complete list of debts including names of people or organizations you are indebted to and the basis for that debt.
- **Contacts:** Create a complete list of family, organizations and any other beneficiaries you intend to leave assets to and percentages of your estate that you want to leave to each.
- **Guardians:** Create a list of individuals you intend to name as guardian of minor children and dependents.
- **Trustees:** If you may want to leave some of your assets in a trust, identify the trustee(s) you want to serve.
- **Questions & Concerns:** Make a list of any concerns or questions you have that you want to address with your attorney.

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