

6 Steps to Financial Freedom

COURSE 6: WEALTH PRESERVATION WORKSHEET

"He who fails to plan is planning to fail." -Winston Churchill

Who should have an estate plan?

Do you have a Will? Y / N

If yes, when was your last update? _____

Do you have a Trust? Y / N

If yes, what kind? _____

Purpose of trust? _____

Do you expect any lump sums or inheritance in the near future? Y / N

What are some important assets that you wish to leave for your loved ones?

1. _____ 4. _____

2. _____ 5. _____

3. _____ 6. _____

Do you plan to have any charitable donations when you die? To whom or what organizations?

Do you have any minors? Y / N

If yes, whom would you want to take guardianship of your children?

Do you have any minors or children with special needs?

Who would you want to be your healthcare directive? (eg. spouse, children, siblings) _____

Whom would you want to be your power of attorney?

Name: _____

Date: _____

