6 Steps to Financial Freedom

COURSE 6: WEALTH PRESERVATION WORKSHEET

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

If yes, when was your last update? when I'm gone.	Who should have an estate plar	1?	
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? 14 25 36 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?			
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