

ESTATE PLANNING STEPS

TOP TEN ESTATE PLANNING STEPS

Working in collaboration with your attorney, follow these basic steps in the estate planning process:

- Share your family information.
- Compile financial information.
- Set goals for your plan.
- Receive legal and tax analysis.
- Review plan recommendations.
- Document preparation by your attorney.
- Review documents, make changes as needed.
- Give approval for attorney to execute documents.
- Implement your plan.
- Set schedule to periodically review your completed estate plan.