



A boutique department within Goosmann Law Firm

Identifying Your Goals

Thank you for choosing Goosmann Trust Law Counsel to handle your estate planning needs. Perhaps the most important part of estate planning is taking the first step.

One of those first steps is to complete and return this form prior to your Initial Consultation Meeting. This allows us to understand what is most important to you and for us to design an estate plan that fulfills your goals.

Please rate the following as to how important they are to you:

- H = High Concern
- S = Some Concern
- L = Low Concern
- N/A = No Concern or Not Applicable

Description	Husband	Wife
Desire to get affairs in order and create a comprehensive plan to manage affairs in case of death or disability.		
Providing for and protecting my spouse.		
Providing for and protecting children.		
Providing for and protecting grandchildren.		
Disinheriting a family member.		
Providing for charities at the time of death.		
Plan for the transfer and survival of a family business.		
Avoiding or reducing estate taxes.		
Avoiding probate (Judicial certification of the validity of a Will is required).		
Reduce administration costs at time of your death.		
Avoiding a conservatorship ("living probate") in case of a disability.		
Avoiding Will contests or other disputes upon death.		
Protecting assets from lawsuits or creditors.		
Preserving the privacy of my estate from business competitors, dishonest persons and curiosity seekers.		
Plan for a child with disabilities or special needs, such as medical or learning disabilities.		
Protecting children's inheritance from the possibility of failed marriages.		

Protect children's inheritance in the event of a surviving spouse's remarriage.		
Provide that your death shall not be unnecessarily prolonged by artificial means or measures.		
To decide which of my family or loved ones will make decisions for me if I am unable.		
Other Concerns (Please list below):		

Of all the items above, please list the top 3 concerns or wishes you would like to accomplish through your estate plan:

HUSBAND	WIFE
1.	1.
2.	2.
3.	3.

Your estate plan should address all your hopes, fears and wishes. Please note any items you want included in your estate plan or that you wish to discuss with the Goosmann Trust Law Counsel members during your Initial Consultation Meeting:

Thank you for choosing Goosmann Trust Law Counsel.
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