

523 Park Point Dr., Ste. #350
Golden, CO 80401
(303) 670-9855 Phone
(303) 670-5381 Fax



7887 E. Belleview Ave., Ste. #820
Denver, CO 80111
(303) 670-9855 Phone
(303) 762-0014 Fax

ESTATE PLANNING GOALS

PLANNING ISSUE	IMPORTANCE				
	LEAST				MOST
RETAINING CONTROL DURING LIFETIME	1	2	3	4	5
PLANNING FOR INCAPACITY					
Financial Management	1	2	3	4	5
Health Care Issues	1	2	3	4	5
AVOIDING PROBATE					
Cost	1	2	3	4	5
Delay	1	2	3	4	5
Complication	1	2	3	4	5
Privacy	1	2	3	4	5
SPOUSAL PROTECTION					
Catastrophic Creditor Protection	1	2	3	4	5
Medicaid/Government Benefits Protection	1	2	3	4	5
Investment Assistance	1	2	3	4	5
Remarriage (Anti-Bimbo) Protection	1	2	3	4	5
ESTATE TAX PLANNING	1	2	3	4	5
KEEPING ASSETS IN THE BLOODLINE	1	2	3	4	5
PLANNING FOR MINOR (GRAND) CHILDREN	1	2	3	4	5
PLANNING FOR BENEFICIARY'S "SPECIAL NEEDS"	1	2	3	4	5
PLANNING FOR ADULT CHILDREN					
Investment Assistance	1	2	3	4	5
Tax & Administrative Assistance	1	2	3	4	5
Divorce Protection	1	2	3	4	5
Catastrophic Creditor Protection	1	2	3	4	5
Medicaid/Government Benefits Protection	1	2	3	4	5
SPECIAL BEQUESTS TO INDIVIDUALS/CHARITIES					
Money	1	2	3	4	5
Property (Business, Farm etc.)	1	2	3	4	5
Personal Effects	1	2	3	4	5
Charities	1	2	3	4	5

OTHER SPECIAL CONCERNS? (Please Specify)

IN ADDITION TO RETAINING CONTROL, PLEASE REVIEW AND LIST YOUR TOP 3 GOALS IN ORDER OF IMPORTANCE TO YOU.

1. _____
2. _____
3. _____