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Types of Things I Do

1. Draft wills, trusts, healthcare directives, and powers of attorney.
2. Design wealth preservation and asset protection strategies.
3. Tax Planning – Estate, Gift and Income Taxes
4. Estate/Trust Administration (Probate and Non-Probate)
5. Disability Planning
6. Charitable Gift Planning

Questions You Can Ask Your Client

1. **Do you have children?**
 - a. **MINORS:** If you and your spouse were not here, who would you like to care for them? Manage their money? Decide where they go to school? When their curfew is? Etc. **Do you have a will naming that person as guardian?** If not, a court will appoint guardian without your input.
 - b. **Do you have children from a previous marriage?**
 - c. **Do you want to provide for their education?**
 - d. **Do any of them have special needs?**
 - e. **Do you want to provide them with incentives for developing good work ethic, study habits, etc.?**
2. **Who would care for you and make decisions regarding your health care and property should you become disabled?**
3. **Do you own a business?**
 - a. **YES:** Do you know what will happen to it if you become disabled or die?
 - i. **NO:** You need a business succession plan.
 - ii. **YES:** That's great. But you may want to review your plan if it has been awhile since it was updated.
4. **Do you want to support charities? Save taxes? Help others? Improve the environment?**
5. **Are you worried that you may be sued?**