

**Current Factual Data**

**Family Information**

- Ages-Spouse
- Kids-Spouses-GrandKids
- Jobs-Income/Wealth
- Prior MK- Kids

**Business Information**

- Bus Type (C, S, LLC, P)
- Partners-Control-Family
- Valuation-Appraisal?
- Income (net before tax)
- Buy/Sell (Type, Funded?)
- Key People

**Real Estate**

- Ownership/Title
- Value
- Business
- Personal Residence
- Vacation Homes

**Liquidity**

- Cash/stocks/Bonds

**Qualified Plans**

- Ownership/Value

**Life Insurance**

- Death Benefit
- Ownership
- Type
- Cash Value

**Liabilities**

**Charitable Giving**

**Advisors**

**Terms of Will/Plan**

- M/D - CST-QTIP
- Outright /Trusts
- Strategies

**Succession Plan**

- Family, 3rd Party, Key Emp.

**Preliminary Thoughts**

**Healthy Income**

**Value Outside Yourself**

- Disposition-Control

**Impacting Heirs**

- Taxation/Shrinkage
- Family & Friends, Charity, Gov
- Outright VS In Trust

**Asset Protection**

- Creditors, Divorce, Estate Tax

**Asset Equalization**

**Asset Shifting**

**Charitable Giving**

**Basic Assumptions**

- Accumulated Interest Rate \_\_\_\_\_
- Desired Retirement Income \_\_\_\_\_
- Interest Rate @ Death \_\_\_\_\_
- Desired Retirement Age \_\_\_\_\_
- Estimated Annual Expenses \_\_\_\_\_
- Retirement Interest Rate \_\_\_\_\_
- Desired Spendable Income \_\_\_\_\_
- Estimated Annual Savings \_\_\_\_\_
- Years Until Retirement \_\_\_\_\_