

# Price & Farrington's Estate and Tax Planning Fast Faxes

July, 2001

Estate, Tax and Family Wealth Preservation Planning For Advisors

## Price & Farrington

Attorneys and Counselors at Law

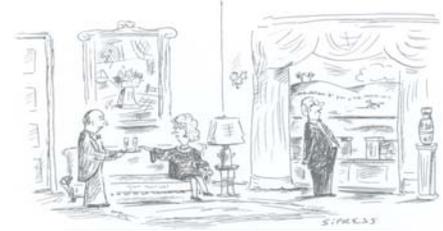
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## 29 (And More) *Non-Tax* Reasons To Do Your Estate Planning: *Avoiding Complacency After Estate Tax "Repeal"*



"I feel so good today I could almost turn down a tax cut"

family or favorite causes?

29. And on, and on, and on.....

1. Who should I name to *manage my affairs* if I am disabled or incapacitated?
2. Do I understand what is involved if I become *disabled* and I haven't made plans?
3. Who should I name to make my *health care decisions* if I can't make them?
4. Should I seriously consider putting a *living trust* in place?
5. Are my insurance and retirement plan *beneficiary designations* coordinated with my overall estate planning goals?
6. Does the way I hold *title to my property* support or undermine my goals?
7. Should I structure my affairs to avoid *probate*.
8. Should I implement a *gifting* program for my children or grandchildren?
9. Have I explored available *charitable giving* opportunities?
10. How can I protect the assets in my estate from *creditors and predators*?
11. What kind of *pre-nuptial planning* is important for me?
12. What kind of *divorce protection* do I need?
13. What *remarriage* issues should I address if my surviving spouse remarries?
14. What instructions should I leave behind in my *Living Will*?
15. Who should I nominate to *administer my estate* following my death?
16. Do I have plans in place to *streamline* the *administration* of my estate?
17. *Who* should receive my property?
18. *How* should they receive it?
19. Have I taken steps to minimize *family conflicts*?
20. Do I need to create a *special needs trust* for my children or grandchildren?
21. Do I need to create a *parental support trust* for my aging parents?
22. How do I want to dispose of my *personal property*?
23. How can I best plan for my "*blended*" family?
24. How can I provide for my *surviving spouse* and then direct where the assets go?
25. What arrangements should I make for the *care of my pets* for after I'm gone?
26. How can I most effectively use *life insurance* to:

T Fund a business *buy-out*?

T Equalize the shares of my beneficiaries?

T Pay *income taxes* due on my IRA or qualified retirement plan?

T Pay *capital gains taxes* on assets which will not qualify for a step-up in basis?

T Finance *charitable giving*?

T Create *additional wealth* to care for special needs of my beneficiaries?

27. How can my plan most effectively promote my *values*?

28. How can I leave a *legacy* for my

### Estate Tax "Repeal": Hope? Or Hoax?

"Advanced Estate Planning

For Estates of \$2 Million and Above"

Mon., June. 18, 7:00 p.m.-9:00 p.m.

☞

"Protect Your Estate!

The Nuts & Bolts of Estate Planning"

Tues., June. 19, 7:00 p.m.-9:15 p.m.

☞

"IRA Planning:

Tools, Tips and Traps"

Wed., June. 27, 7:00 p.m.-9:00 p.m.

☞

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