

THE 15 MOST IMPORTANT ESTATE PLANNING QUESTIONS

1. What is an estate plan and why should I have one?
2. How often should I review or update my estate plan?
3. What are the three essential estate plan documents?
4. What is probate?
5. Should I have a Will or a Trust?
6. What are death taxes and how do I avoid them?
7. How should I own my assets or properties?
8. Who should I name as beneficiary on my IRAs and retirement plans?
9. Should I purchase long term care insurance?
10. Should I be considering charitable gift planning?
11. Should I form a family corporation or limited liability company?
12. Should I convert to a Roth IRA in 2010?
13. Should I set up a 529 account for my children's education expenses?
14. Do I need to consider asset protection planning?
15. Do I really need an attorney to prepare my estate plan?

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