

YOUR ESTATE PLANNING WORKSHEET

If you have questions about any of the estate planning topics covered on this website, or want to know how they relate to you, please print and complete this worksheet, and mail or fax it to us. We will be happy to help you with these or any other questions you may have about your estate planning strategies.

ESTATE PLANNING NEEDS EVALUATION

Please check all boxes that apply to your situation

Do you have an estate plan in place?

- Yes – Date last reviewed: _____
- No, but I would like to develop an estate plan

I need help with:

- Understanding our tax laws
- Writing my will
- Selecting an executor and trustees
- Establishing a living trust
- Valuing my estate
- Reducing estate taxes
- Creating a family limited partnership
- Transferring property
- Creating a buy-sell agreement
- Planning for a second marriage
- Planning for a non-citizen spouse
- Determining the role of life insurance
- Planning for community property
- Updating my estate plan
- Other _____

I would like to learn more about the following estate planning strategies:

- Gifting as a technique for transferring wealth
- Setting up a trust for my heirs
- Creating a succession plan and transferring ownership of my business
- Making taxable gifts
- Giving to charity
- Implementing generation-skipping transfers
- Other _____

My greatest estate planning concern/need is:

Please complete the information below, then mail or fax this form to us. If you prefer, call us at (516) 333-7799 to discuss your estate planning needs.

YOUR NAME

TITLE

ORGANIZATION

ADDRESS

CITY

STATE

ZIP

PHONE

FAX

EMAIL

Harriette M. Steinberg, P.C. Attorney & Counselor-at-Law
1400 Old Country Road, Suite 416, Westbury, New York 11590

Phone (516) 333-7799 • **Fax** (516) 333-3113 • **Website** www.lawyersonli.com • **Email** Help@lawyersonli.com