



ESTATE PLANNING 101®

The 10 Questions Every Estate Plan Should Answer:

Asking yourself the following questions is a good way to ensure you are operating under the correct presumptions, and that you have taken the necessary steps to achieve your goals.

1. Have I nominated a guardian for my minor child?
2. I have a Will, is that enough to transfer my assets after my death?
3. Is my estate large enough to justify creating a Trust?
4. Should I have a Disclaimer Trust or an AB Trust?
5. Have I properly funded my Trust?
6. How often should I review my Trust?
7. Does my Trust have “stretch-out” provision to address retirement accounts?
8. Have I planned for incapacity during life?
9. Can I change part or all of my Trust without changing title to all of my assets?
10. Am I subject to the estate tax?

Adam L Sherry, Attorney
858.487.7948
Anderson & Yocum, APC

www.AndersonYocum.com
ASherry@AndersonYocum.com

What is an Estate Plan?

Generally speaking, an estate plan can refer to a set of documents or the steps a person takes to safeguard his or her family and assets in case of incapacity during life (a coma following a car accident or a stroke), as well as the steps a person takes to ensure his or her assets will pass to a person of their choosing after death.