

# IMPORTANT POINTS TO CONSIDER IN PLANNING YOUR ESTATE

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1. **Will:** Have you made a will and been diligent in updating it to keep it consistent with current objectives and family changes?
2. **Power of Attorney:** Has sound management of assets been arranged if you are no longer able to perform this function?
3. **Health Care Proxy:** In the event of terminal illness, has health care been considered? Have you created a living will or healthcare proxy?
4. **Property Distribution and Trusts:** How will the distribution of property under the current estate plan affect your family? Will assets passing to beneficiaries be prudently managed?
5. **Life Insurance:** Has life insurance been purchased to meet your estate planning objectives? Have the benefits of irrevocable trusts been considered?
6. **Charitable Givings:** Does this current plan take advantage of charitable giving to support those causes most meaningful to you?
7. **Business Interests:** If you own a business, is the current plan designed to carry out your wishes regarding the succession or transfer of the business?
8. **Preserving Wealth:** Do you anticipate having a large enough estate to be subject to estate tax? If so, how does the current plan provide funding for this tax liability?



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