

What's Your Plan?

Estate Planning Goals

An important step in setting up an estate plan is putting down on paper the various goals we have as individuals or couples. These goals include family and other heirs, Power of Attorney for Health Care, Power of Attorney for Finances, and much more.

The following are some of the common goals shared. This list will assist you in your thought process and then also in the ranking of your goals.

Goals	High Ranking	Medium Ranking	Low Ranking
Establish guardianship for minor children.			
Increase current income.			
Reduce estate taxes.			
Provide for my congregation.			
Provide for other ministries.			
Provide for healthcare if disabled.			
Sell appreciated assests tax-free.			
Plan for my business.			
Other goals....			



For more information and helpful
resources go to drlc.org/eternity

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