

Chapter 12 Toolkit

We have included examples of the worksheets and tools you will need to implement in this chapter:

1. Outline of Letter of Intent.
2. Things to Decide *before* You Get in Your Lawyer's Office.

Worksheet 1: Outline of Letter of Intent

Write some things down!

1. Purpose of the letter:

Why am I writing this? Who is my audience?

2. History:

What is my background? Where did the wealth come from?

3. What I/we think is important:

What do I value?

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4. Responsibility to myself/ourselves:

5. Responsibility to my/our heirs:

6. Responsibility to my/our extended family:

7. Responsibility to the community:

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8. Structural considerations:

What works and doesn't work for me? Privacy? Control? Complexity?

9. Taxes:

What priority level do I give to saving taxes? What am I willing to give up to save taxes?

10. Next steps:

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Worksheet 2: Things to Decide *before* You Get in Your Lawyer's Office

1. If you die before your spouse, are you willing to leave your estate to your spouse with no strings attached?

2. If you both die, would you like to have your entire estate held as a common fund for your children, or would you like to have each of your children have his or her separate trust fund?

3. At what age (or ages) would your children be entitled to receive their inheritance outright, free and clear of any trust?

4. Who do you want to act as your personal representative or executor?

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5. Who do you want to serve as trustees of the trusts established for your children?

6. Who would you like to serve as the guardian for your minor children if both of you die?

7. If your entire family dies in a common disaster, whom should the estate pass to?

8. What specific items of property would you like to leave to designated individuals?

9. Do you want any portion of your estate passed to charity?

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