

**WEALTH REGENERATION AT RETIREMENT
PLANNING FOR A LIFETIME OF LEADERSHIP**

Kaycee Krysty with **Robert Moser**, forward by **James E. Hughes**

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?
