

**List Planning Objectives**

Level of Importance

	High	Medium	Low
1. Getting the estate in order	_____	_____	_____
2. Probate avoidance	_____	_____	_____
3. Death tax reduction	_____	_____	_____
4. Care of children after death	_____	_____	_____
5. Transferring the business	_____	_____	_____
6. Providing sufficient cash flow	_____	_____	_____
7. Covering risk exposure	_____	_____	_____
8. Retirement planning	_____	_____	_____

**Specific Areas Which Need Current Review**

1. \_\_\_\_ Present wills and trusts
2. \_\_\_\_ Insurance Program
3. \_\_\_\_ Current investments
4. \_\_\_\_ Fringe benefit package
5. \_\_\_\_ Business agreements
6. \_\_\_\_ Gifting program
7. \_\_\_\_ Disability income
8. \_\_\_\_ Long-term care
9. \_\_\_\_\_
10. \_\_\_\_\_

*“Helping Some of Michigan’s Wealthiest Families Protect and Grow Their Estate since 1990”*

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