



HAWAII COMMUNITY
FOUNDATION

Estate Planning Goals Checklist

Before consulting with an attorney about your estate, it may be helpful to both you and your attorney if you review the checklist below to help prioritize your goals. Rate each item on a scale from 1 to 10, with a 10 being very important to you. **Remember, your estate plan should be customized for your needs -- not somebody else's.**

1. _____ Providing a secure financial future for me (and my spouse)
2. _____ Providing a financial legacy for my children
3. _____ Minimizing estate taxes
4. _____ Planning for my possible disability
5. _____ Providing a charitable legacy
6. _____ Disinheriting a natural heir
7. _____ Providing for a handicapped or special needs person
8. _____ Restricting heirs from spending their legacy
9. _____ Protecting myself against greedy heirs
10. _____ Avoiding income tax on capital gains
11. _____ Providing a legacy for my grandchildren
12. _____ Arranging for personal items to go to certain heirs
13. _____ Creating more income from my current assets
14. _____ Keeping my affairs secret
15. _____ Saving my heirs the time and labor of probate
16. _____ Provide guardians for my minor children
17. _____ Avoid family quarrels over the estate