

## Joseph Caccippio Financial Advisor

### Planning Discussion Guide: Estate Planning Strategies

- What is important to you in distributing your wealth?
- What type of planning have you done for your family's estate? Will, Trust, Durable Power of Attorney, Health Care Power of Attorney, Living Will, Revocable Living Trust
- Have you identified your beneficiaries?
- How have you communicated your wishes to your family or heirs?
- Who will oversee your estate and make financial decisions?
- What are your shared values as a family?
- What goals and aspirations do you have for your family?
- How are you encouraging family members to pursue their careers and business opportunities on their own?
- How would you describe your family's ability to be collaborative and make decisions together?
- What conversations are having around family wealth, business matters and other estate planning topics?
- What are your goals for supporting family members - special needs - educational goals?

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