VIATOR
WEALTH MANAGEMENT GROUP
of NEST CAPITAL

ESTATE PLANNING PREPARATION GUIDE

An effective estate plan helps provide clarity and protection for those you care about most. This guide is designed to help you think through the people, assets, values, and goals that will shape your estate planning decisions and prepare you for a productive meeting with your attorney.

REFLECT BEFORE YOUR MEETING

- What concerns you most about your current estate plan?
- What does a successful estate plan look like to you?
- What legacy would you like to leave behind?

DOCUMENTS TO CONSIDER BRINGING ALONG (as applicable):

Existing Estate Planning Documents

- Current Will(s)
- Trust document(s)
- Durable Financial Power of Attorney
- Healthcare Power of Attorney
- Living Will / Advance Directive
- Funeral or memorial instructions

Family

- Current beneficiary designations for:
  - Retirement accounts
  - Life insurance
  - Annuities
  - Transfer-on-death accounts
- Names and dates of birth for spouse, children, and grandchildren
- Information regarding prior marriages
- Information regarding family members with special needs
- Guardianship considerations for minor children

Financial Information

- Recent investment statements
- Bank account information
- Retirement account statements (IRA, Roth IRA, 401(k), 403(b), etc.)
- Life insurance policies or summaries
- Annuity statements
- List of significant assets and approximate values

Real Estate Information

- Property deeds
- Recent property tax statements
- Real estate ownership information
- Documentation for any rental, commercial, or investment properties

Business Information

- Buy-sell agreements
- Operating agreements
- Partnership agreements
- Business valuation (if available)
- Ownership records

Additional Documents

- Prenuptial or postnuptial agreements
- List of significant debts or liabilities
- Charitable giving information
- Business succession plans
- Digital asset information

QUESTIONS TO DISCUSS WITH YOUR ESTATE PLANNING ATTORNEY

General Estate Planning

- Does my current estate plan still reflect my wishes?
- Are my existing documents sufficient, or should they be updated?
- Would a trust be beneficial for my situation?
- How often should my estate plan be reviewed?

Family & Legacy Planning

- Should assets be distributed equally or based on individual circumstances?
- Are there family dynamics that should be addressed in my estate plan?
- Are trusts appropriate for any beneficiaries?
- How can I best provide for future generations?

Executor & Trustee Selection

- Have I selected appropriate individuals to serve?
- What responsibilities will my executor and trustee have?
- Should I consider a professional or corporate trustee?
- Have I named appropriate backup decision-makers?

Business & Real Estate Planning

- How should my business interest transfer at death?
- Is there a succession plan that should be put in place?
- What is the best way to transfer real estate or family property?
- How can future conflicts among owners or heirs be minimized?

Tax & Wealth Transfer Planning

- Are there estate tax concerns I should be aware of?
- Would gifting strategies make sense for my family?
- Are there opportunities to transfer wealth more efficiently?
- How should highly appreciated assets be handled?

Charitable Planning

- What are the most tax-efficient ways to support charitable causes?
- Should charitable wishes be included in my estate plan?
- Are there planning strategies that can benefit both my family and charitable goals?

Planning for Incapacity

- Who will make financial decisions if I cannot?
- Who will make healthcare decisions if I cannot?
- Are my powers of attorney properly structured?
- Are there additional protections I should consider?

"If something happened tomorrow, would the people I love know what to do, where to find important information, and how to carry out my wishes?"

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PM-03222028-5950656