The Vital Questions for your Clients and their Families

(Excerpted from, ProVisors' Seniors and Special Needs Affinity Group Collected from December 17, 2019 Meeting)

- Are all vital assets added to your trust?
- Are you open to asking an outside, trusted advisor to run a family meeting? If so, who will create the agenda for that meeting?
- Are your estate planning documents accessible (i.e. not locked up), so they can be accessed when necessary?
- Do you have a cash flow forecast prepared indicating what you can afford to pay for care on an annual basis?
- Do you have a list of all your trusted advisors - i.e. attorneys, accountant, banker, realtor, care manager, etc.?
- Do you want any adult children that live with you to pay rent?
- Do your trusted advisors know what to do to continue your legacy?
- Have all your investments been reviewed, per regulatory requirements? (For those over 75 years old)
- Have you built a team of trusted advisors?
- Have you made burial plans and/or purchased a plot?
- Have you made sure your trustee/executor knows where everything is?
- How do I ensure my second/third, etc. spouse and my original children are treated fairly?
- How do we bring the family to the table to have a full discussion?
- How do you "even up the books" at the end of life if you've taken care of spend-thrift child or other beneficiary?
- How will you afford care at the end of your life?

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- If one of you requires care, who will be the caregiver?
- What are your requests for your funeral and memorial service, including the menu?
- What changes have you had this year to your health, work life and/or relationships (married/divorced)?
- What charitable organizations are you passionate about?
- What do you want the end of your life to look like?
- What have you put in place so your children don't fight over your legacy?
- What is your replacement income strategy for your post W-2 years?
- What kind of care do you want - and NOT want - at the end of your life?
- What kind of food would you like at your repast?
- What will happen to the surviving spouse after the first spouse dies?
- When was the last time you reviewed (and updated) your estate planning documents with your attorney?
- Where are your insurance policies?
- Where are your passwords?
- Where is the key to your safe deposit box?
- Where is your advanced health care directive?
- Where is your financial organizer?
- Where is your will, trust and other vital documents?
- Where would you like to live if something were to happen to you? ● Who do you want in charge of taking care of your minor children?
- Who do you want in charge of taking care of your special needs children?
- Who is your executor?
- Who is your trustee?
- Who will go to medical appointments with you and take accurate notes at each visit?