

Exercise 11.4
Current Wills, Legal Documents, and Titling of Assets

10 minutes

I am not a legal expert, but basically, my wills and other legal document do the following:

___ I have no will.

___ My will leaves everything to my spouse or partner, then to the kids or other relatives, friends, or organizations.

___ My spouse or significant other and I have wills that minimize taxes by passing what we can to heirs tax-free.

___ My will and that of my spouse or partner have been gone over recently with a tax attorney to minimize taxes through fairly complex planning.

___ We last talked to an attorney about our wills in (approximate year) _____.

___ My highest personal priority is to make progress on my legacy planning by:

I will do this with the help of (who) _____ ,
(by when) _____