

Advanced Estate Planning Check-Up

At our initial conference we may discuss the following topics, if they are relevant:

Notes

1.	Putting business interests or real property either in a Corporation or in a Limited Liability Company.	
2.	The record book for your Corporation includes ByLaws, Minutes of annual Shareholder meetings and Minutes of annual Board of Directors meetings.	
3.	The record book for your Limited Liability Company contains an up-to-date Operating Agreement.	
4.	A Buy Sell Agreement with my business partners.	
5.	Completed a cash flow analysis of income and expenses for my retirement needs.	
6.	Life insurance to provide adequate liquidity for my family upon my death.	
7.	Long-term care insurance to provide for nursing home protection.	
8.	Adequate property and casualty insurance.	
9.	Asset protection against lawsuit liability.	
10.	Providing for keeping the family cottage, business or farm in the family.	
11.	Providing for the continuation of my low property tax rates on the family cottage for my children.	