

# Estate Planning Note Taking Guide

	Total Points Earned
	Total Points Possible
	Percentage

Name \_\_\_\_\_

Date \_\_\_\_\_

Class \_\_\_\_\_

## Estate planning as a form of giving

Define estate planning:

Other than death when is an estate plan useful?



What are four positive outcomes of estate planning?

1

2

3

4

**Estate planning is an integral part of financial planning**

Why is a written letter preferred over a conversation, when working with wills?

What are four things to share in a letter of last instruction?

Define guardianship:

