

Why We Choose To Leave Money To Our Children

Leaving our property to our children is a choice, not a requirement. Using this worksheet, we articulate to ourselves why we wish to leave property to our children and what we hope to accomplish.

Most estate planning presupposes that parents want to leave assets to their children upon their deaths. Leaving assets, however, is a choice. Under the law, you may leave your assets to any individual, institution, or entity you choose. If you do not have living children or choose not to leave them assets upon your death(s), please so indicate below. If you have living children (and /or grandchildren), however, and you intend to leave a portion of your estate to them, please articulate the three or four specific reasons you have chosen to do so. If you are married, it is important to complete this worksheet as a couple.

We do not have living children or do not want our assets to pass to them.

We want to leave a portion of our wealth to our children for the following reasons. In order of priority these reasons include:

1. _____

2. _____

3. _____

4. _____

Note: This form has no legal binding effect. Your advisors may use it to trigger thought, discussion, and dialogue as they work to create a Legacy Plan for you.

Name _____

Date _____