



CONTACT

Raymond P. Kolak

A 55 W. Monroe Street
Suite 1925
Chicago, Illinois 60603

P 312.236.0646

F 312.236.0105

E rkolak@eckhart.com

W www.eckhart.com

Checklist: Preparing For An Estate Plan

- Your goals
- List of assets and liabilities
- Use of living trust
- Will
- Life insurance
- Jointly-held property
- Gift program
- Treatment of pension plan, IRA
- Bequests of household goods
- Bequests of cash
- Division of remainder of estate
- Estate tax estimate
- Consideration of charitable gifts
- Choose trustee and executor
- Guardians for minor children
- Trusts for minor children
- Choose agent under powers of attorney