

This Getting Ready for Estate Planning workbook is provided to you to help you work through the six steps and have a record of the items that you have decided upon. Please use this page to check off the items that are completed and the date you completed the step.

Person completing this step	Date	6 Steps:
_____	_____	1. Initiate the discussion
_____	_____	2. Take stock of the present
_____	_____	3. Develop objectives
_____	_____	4. Choose Advisors
_____	_____	5. Consider Alternatives
_____	_____	6. Review and Modify