

# Checklist of Questions to Answer in Your Estate Plan for Your Children

Good parents care about their children's future—great parents **plan for it**. No one likes to think of what would happen if his or her children were left without a parent. Sadly, accidents do happen, and no one is guaranteed to watch their children grow into adults.

Crossing your fingers and hoping that your children will never be left without parents is not the best way to protect them. Instead, establishing a sound plan in the event that your kids are left without you is the **best way** to protect them, yourself, and the rest of your family.

We created a checklist based on the common questions we ask parents who are just starting out their estate planning journey. Every situation is a little different, but these general questions will help you get started:

## Caretaking:

- Who would you want to care for your children long term if you were gone?
- If that person or people live far away, who would you want to care for your children temporarily until they could travel to your children?
- Do you have a preference for the parenting style(s) you would like the guardian(s) to follow?
- Do you have a preference for where your children go to school?
- Do you have a preference for a religion you want your children to follow?
- Do you have a place where you have compiled all of their important documents, including birth certificates, social security cards, passports, etc.?
- If so, do your choice(s) for guardian(s) know where these documents are kept?

## Finances:

- Who would you like to manage the money you leave for them if they are minors?
- Do you want there to be a maximum amount spent on them each year if they are minors?
- Do you want to set aside a specific amount for higher education?
- How would you want them to receive their money as adults?
- Would you like them to receive the funds outright in full?
- Would you like them to receive the funds outright in separate payments?
- Would you like to leave the money to them in a trust with protections against future lawsuits, creditors, and divorce?
- If you have a child with special needs, do they receive or will they likely receive public benefits?
- If so, have you already established a Special Needs Trust?

### Not sure about your next step(s)?

Give yourself the peace of mind that your family will be protected in the event of a tragedy. Not only will a Children's Safeguard Plan provide you and your children with a long-term solution for their care, but it will also provide your babysitters, caregivers, emergency personnel, and loved ones guidance on what to do in an emergency situation if you're not there.

To get started, call us at **919-899-4917** or [contact us online](#) and we'll schedule a free consultation today.



**Free Webinar:** [3 Easy Steps To Protect Your Minor Children](#)  
**Free E-Book:** [The Children's Safeguard Planning Guide](#)

*Carolina Family Estate Planning*

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