



## HEALTH AND WEALTH QUESTIONS

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*Here are some things to consider asking yourself and your family as you think about your health and finances today and for years to come.*

### **Wealth Questions**

1. At what age should I think about doing some estate planning?
2. When is it time to review my existing estate plan with my estate planning attorney?
3. I am a widow/widower. How can I minimize the amount of estate tax due at my death?
4. How can I balance saving for retirement with saving for my children's education?
5. What is the best way to help finance my grandchildren's education?
6. What has your experience been with family philanthropy?
7. Should I make lifetime wealth transfers to my children and if yes, when?  
How would you recommend doing this?
8. How is a health care directive to a physician different from a health care power of attorney?
9. Why do you recommend that I share my estate plan with my beneficiaries before I die?
10. What is the advantage of making lifetime transfers to family and charity?
11. I am an entrepreneur. In your experience, when is the right time to begin succession planning?
12. What questions should I ask a financial advisor to determine if he or she is the right match for my situation? What qualifications should my advisor have?

### **Health Questions**

1. What's really the good of planning? Doesn't it really all boil down to genetics?
2. One of the things I think many of us are confronting is aging parents who live far away. What are the best ways we can help them get healthier?
3. The scariest thing for most of us is declining mental health, any real progress on Alzheimer's and dementia?
4. What are the most exciting advances around the corner for quality of life after sixty?  
How do supplements factor in?



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