executor's RESOURCE

Top 10 things to ask my advisor about my legacy and estate planning

By Executor's Resource, Inc.

If you are working with a financial advisor, plan to discuss a wide variety of estate and legacy topics with him or her at your annual meetings. Use the questions below as a guideline of discussion points to cover when you meet.

1. What should I think about when selecting an executor?
2. Do you offer any centralized information of all the accounts I have with you?
3. Can I list you as a key contact and direct my executor to you when he has questions?
4. Do any of my accounts need additional features added – transfer on death instructions; duplicate statements; automatic bill pay or wire instructions – to make it easier for my executor?
5. When did I last update my beneficiary designations? Can you give me copies of every beneficiary designation form to upload into EstateLogic?
6. I recently set up a trust for certain assets. Can you help me title my accounts so they are consistent with the trust?
7. Can we meet about setting up more appropriate estate planning accounts, such as conversions to a Roth IRA or rolling over my former employer 401(k)s?
8. Can we discuss insurance options that I should be thinking about to protect my family once I'm gone, such as life insurance, long-term care, disability?
9. Can we review my employer's pension plan and decide on the best choices for me and my spouse?
10. What information/resources do you have for dealing with my parents' legacy and estate planning?

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