



BOB CARLSON'S

Retirement Watch  
SPOTLIGHT SERIES

# 7 Questions Your Adult Children Must Be Able to Answer

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# Do You Want A Successful Estate Plan?

- **The plan is only the beginning**
- **Don't leave a mess to clean up**
- **Don't assume they know**
- **Need to start to share**
- **Might be uncomfortable conversations**

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# What Is Your Personal Information?

- **Full name**
- **Birth date, SSN, Medicare card, veterans info**
- **Previous addresses, parents' names**
- **Any personal ID info**
- **Make copies of documents**

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# Where Are Your Lifetime Documents?

- **POA, advance medical directive, etc.**
- **Medical information -- comprehensive**
- **Documents and details**
- **Keep it all updated**

**It doesn't do any good if no one knows about it and where to find it**

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# What About When You Need Help?

- **Where do you want to live?**
  - **Home with assistance or other residence?**
  - **How will that be done?**
- **Geographic location? Have you looked?**
- **What about spouse?**

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# How Will LTC Be Paid?

- **Do you have insurance?**
- **Adequate liquid resources?**
- **Qualify for Medicaid?**
- **Aid and assistance?**
- **What is your plan?**

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# What Insurance Do You Have?

- **Need comprehensive list**
- **All the details plus documents**
- **Life insurance especially important**
- **Don't forget employer and veterans coverage**

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# Which Estate Documents Do You Have?

- **Will, living trust**
- **Assets, liabilities**
- **Digital assets and accounts**
- **Debts**
- **Safe deposit boxes**
- **Financial accounts**

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# What Estate Documents Do You Have?

- **Where are they located?**
- **Who is executor?**
- **Contact info on professionals**
- **Debts**
- **Safe deposit boxes**
- **Financial accounts**

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# What About Personal Items?

- **Collections**
- **Mementoes**
- **Special items**
- **Do they have monetary value?**
- **Details about handling them**
- **Who should get them?**
- **Avoid disputes**

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# What Arrangements Do You Prefer?

- **Burial and service preferences**
- **Aid and comfort to survivors**
- **Not binding in many states**
- **Preferred obituary**
- **Whom to contact**

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