

# GIFTMARK CHECKLIST

| Personal Finance Giftmarks |   |
|----------------------------|---|
| <input type="checkbox"/>   | Make gifts  |
| <input type="checkbox"/>   | Prepare will  |
| <input type="checkbox"/>   | Execute a financial durable Power of Attorney   |
| <input type="checkbox"/>   | Secure life insurance that will provide for loved ones and other life's end goals             |
| <input type="checkbox"/>   | Save on taxes   |
| <input type="checkbox"/>   | Create living trust during life that will avoid probate                                       |
| <input type="checkbox"/>   | Create trusts at end of life  |
| <input type="checkbox"/>   | Extend benefits to future generations   |
| <input type="checkbox"/>   | Protect property from creditors   |
| <input type="checkbox"/>   | Retain property in your family  |
| <input type="checkbox"/>   | Preserve property in case of failed marriages   |
| <input type="checkbox"/>   | Obtain professional management and financial services   |
| <input type="checkbox"/>   | Get professional financial advice   |
| <input type="checkbox"/>   | Carry out beneficiary designations for 401k's, IRAs, retirement plans, and insurance policies |

**Use as a checklist guide while alive to ensure all your wishes are carried out as you want them to be.**

| Family Giftmarks         |   |
|--------------------------|---|
| <input type="checkbox"/> | Provide for family                        |
| <input type="checkbox"/> | Avoid family feuds                        |
| <input type="checkbox"/> | Encourage selected values                 |
| <input type="checkbox"/> | Spend quality time with family            |
| <input type="checkbox"/> | Establish family traditions               |
| <input type="checkbox"/> | Help relatives through tough times        |
| <input type="checkbox"/> | Compensate for tragedy or misfortune      |
| <input type="checkbox"/> | Care for parents                          |
| <input type="checkbox"/> | Encourage education                       |
| <input type="checkbox"/> | Encourage work ethic                      |
| <input type="checkbox"/> | Reward and teach family loyalty           |
| <input type="checkbox"/> | Continue the family name                  |
| <input type="checkbox"/> | Do the unexpected                         |
| <input type="checkbox"/> | Take trips and spend time with the family |
| <input type="checkbox"/> | Provide funds to trace family genealogy   |
| <input type="checkbox"/> | Take photos to document                   |
| <input type="checkbox"/> | Demonstrate importance of small gifts     |

| Personal Finance Giftmarks |                               |
|----------------------------|-------------------------------|
| <input type="checkbox"/>   | Donate organs for medical use |
| <input type="checkbox"/>   | Prearrange funeral            |
| <input type="checkbox"/>   | Prearrange burial             |
| <input type="checkbox"/>   | Design/choose monument        |
| <input type="checkbox"/>   | Write own epitaph?            |
| <input type="checkbox"/>   | Write own memorial service?   |
| <input type="checkbox"/>   | Plan memorial gathering?      |

| Family Giftmarks         |                                      |
|--------------------------|--------------------------------------|
| <input type="checkbox"/> | Provide for family                   |
| <input type="checkbox"/> | Avoid family feuds                   |
| <input type="checkbox"/> | Encourage selected values            |
| <input type="checkbox"/> | Transfer business interest           |
| <input type="checkbox"/> | Establish family traditions          |
| <input type="checkbox"/> | Help relatives through tough times?  |
| <input type="checkbox"/> | Compensate for tragedy or misfortune |

| Business Giftmarks       |   |
|--------------------------|---|
| <input type="checkbox"/> | Transfer business interest                |
| <input type="checkbox"/> | Continue the family business              |
| <input type="checkbox"/> | Write agreements for transfer of business |
| <input type="checkbox"/> | Develop a management succession           |
| <input type="checkbox"/> | Train future managers                     |
| <input type="checkbox"/> | Provide life insurance for employees      |
| <input type="checkbox"/> | Provide disability programs for employees |

