

80/20 Estate Planning
Host – Albert E. Gibbons

Tape # 1

Guests:

Michael E. Thomas – Michael E. Thomas, P.C.
David M. Frees, III, Esq. – Unruh, Turner, Burke & Frees, P.C.

Topic:

Estate Planning – What is it? Who needs it?

Outline:

What is the “80/20 Estate Planning” method?

What is Estate Planning? Who needs to do it?

What are the problems that need to be addressed?

How do we find out what the client really wants?

How do we overcome the preconceived ideas about Estate Planning?

How important is questioning and really listening to the client?

What is the value questionnaire?

How important is the emotional side of Estate Planning?

What is the importance of planning not only for after the client’s death, but also during their lifetime?

Where does the expertise of the estate planning team members pay off most?

-Is it in the planning, the documentation, or some other area?

What are the goals of Estate Planning, and how to we reach them?