

80/20 Estate Planning
Host – Albert E. Gibbons

Tape # 4

Guests:

J. Michael Hickox, Esq.
Sanford J. Mall – Mall & Associates

Topic:

Current and ongoing implementation

Outline:

What are some of the road blocks to implementation?

How important is the titling of assets?

Is not having a signed will a major problem?

How does an advisor handle educating their clients on the content of their documents?

What should an executive summary accomplish, and what should it contain?

How does an advisor go about empowering his client understand and begin to implement his plan?

How long does this process take?

How does the advisor make sure all assets are funded and titled properly?

What is the significance of beneficiary designations?

How should the entire plan be organized and presented to the client?

How do we manage the ongoing process of implementation, in other words the remaining 20%?