



# BLAZEK & GREGG, P.C., L.L.O.

*Preserve what you have, Protect those you love, Inspire for Generations*

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Appointment Date \_\_\_\_\_ Attorney Name \_\_\_\_\_

## PLANNING FOUNDATIONS

### I. PERSONAL INFORMATION

*“Other things may change us, but we start and end with family”- Anthony Brandt*

Full Names: \_\_\_\_\_

Dates of Birth: Husband: \_\_\_\_\_ Wife: \_\_\_\_\_

SS # Husband: \_\_\_\_\_ Wife: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

Date of Marriage: \_\_\_\_\_

Phone Numbers: Home: \_\_\_\_\_

Husband Work: \_\_\_\_\_ Wife Work: \_\_\_\_\_

Husband Cell: \_\_\_\_\_ Wife Cell: \_\_\_\_\_

*“Every affluent person wishes they could give their children the hardships that made them successful”- Adapted from Robert Frost*

Children: (Full Name and Date of Birth)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



## II. PLANNING GOALS

*“The tragedy of life does not lie in not reaching your goal. The tragedy lies in having no goal to reach”- Benjamin E. Mays*

There are many Estate Planning Strategies currently available. Your goals determine which techniques are best for you. Therefore, the foundation of any quality estate plan must be the goals you have for yourself, your loved ones, and your property. Our firm provides quality Estate Planning documents that are tailored to your specific goals. Please take a moment to consider your goals.

	No	Yes	Rank Importance				
			Low			High	
1. To get our estate in order and create a consistent and comprehensive estate plan.	___	___	1	2	3	4	5
2. To create an estate plan which is valid in every state, and to allow us to decide which state law will apply if we later decide to move.	___	___	1	2	3	4	5
3. To control all of our assets while we are alive and healthy.	___	___	1	2	3	4	5
4. To plan for disability of myself or spouse and avoid the expense, publicity, and loss of control involving court conservatorship proceedings if either of us is disabled.	___	___	1	2	3	4	5
5. To avoid unnecessary placement in a nursing home by providing instructions for in-home health care.	___	___	1	2	3	4	5
6. To control which of our family or loved ones will make decisions for us if we're incapacitated, including health care and life support decisions.	___	___	1	2	3	4	5
7. To plan for elderly parents disability.	___	___	1	2	3	4	5
8. To plan for the transfer and survival of the family business at disability or death.	___	___	1	2	3	4	5
9. To avoid contests and disputes upon death.	___	___	1	2	3	4	5
10. To avoid the expense and delay of probate.	___	___	1	2	3	4	5
11. To reduce estate and death taxes to the lowest level possible.	___	___	1	2	3	4	5
12. To preserve the privacy of my estate and my family from curiosity seekers, dishonest persons, business competitors or creditors.	___	___	1	2	3	4	5
13. To provide for my surviving spouse.	___	___	1	2	3	4	5



	No	Yes	Rank Importance Low High				
14. To protect our children's inheritance if my spouse chooses to remarry after my death.	___	___	1	2	3	4	5
15. To protect the assets of minor or disabled children or grandchildren, so that our family can avoid court control of their property under conservatorship.	___	___	1	2	3	4	5
16. To protect assets of financially irresponsible children.	___	___	1	2	3	4	5
17. To protect our children's inheritance from loss if they should become divorced.	___	___	1	2	3	4	5
18. To plan for a child with disabilities or special needs such as medical or learning disabilities.	___	___	1	2	3	4	5
19. To plan for children from a previous marriage so that they are treated fairly in my estate plan.	___	___	1	2	3	4	5
20. To disinherit one or more of our family members.	___	___	1	2	3	4	5
21. To protect our property from frivolous lawsuits or the claims of predatory creditors	___	___	1	2	3	4	5
22. To plan for our grandchildren.	___	___	1	2	3	4	5
23. To protect and care for one or more pets.	___	___	1	2	3	4	5
24. To save 100% of the estate tax on life insurance so that the insurance proceeds pass estate tax free.	___	___	1	2	3	4	5
25. To give a certain percentage of my estate to my church, college, community foundation or other charity.	___	___	1	2	3	4	5
26. To potentially reduce income taxes and estate & inheritances taxes by including a charity in my estate plan.	___	___	1	2	3	4	5
27. To create a special trust for charity to which we can transfer assets that will give us lifetime income.	___	___	1	2	3	4	5
28. To give specific assets to certain charities.	___	___	1	2	3	4	5
29. To create a declaration that tells the purpose of my life or what my life stands for	___	___	1	2	3	4	5
30. To create a collection of my stories and experiences that captures my history and the wisdom I have gained over my years.	___	___	1	2	3	4	5
31. To develop how I want to be remembered after I pass away.	___	___	1	2	3	4	5



We have other goals and objectives for our estate plan not mentioned yet, and they are:

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Please review and list the top 3 **estate planning goals** in order of importance to you:

1. \_\_\_\_\_ 2. \_\_\_\_\_ 3. \_\_\_\_\_

### III. YOUR FUTURE

*“One of the things that we can lose over time is the ability to dream”- Anonymous*

Take a few moments to dream about the future.

What do you want your life to look like in five years; ten years?

What do you have yet to accomplish? How do you want to impact the lives of those you love?

Visualize your family three generations from now.

If you have considered these things, you have gone to the next level of planning; Legacy Planning. We have a process to continue your Legacy Planning for those who want the ultimate planning experience.

Please review and list your **life planning goals**:

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### IV. ASSETS

*“If a man dies and leaves his estate in an uncertain condition, the lawyers become his heirs”- Edgar Watson Howe*

Our firm offers Medicaid Planning, Will Based Planning, Basic Estate Planning, and Advanced Planning Strategies.

In order for us to understand what type of planning would be most meaningful to you, please provide us with general information concerning your assets.



1. Retirement Assets:

In Husband's Name: \$ \_\_\_\_\_  
In Wife's Name: \$ \_\_\_\_\_

2. Life Insurance Currently in Place:

On Husband's Life: \$ \_\_\_\_\_  
On Wife's Life: \$ \_\_\_\_\_

3. Other Assets:

In Husband's Name: \$ \_\_\_\_\_  
In Wife's Name: \$ \_\_\_\_\_  
In Joint Names: \$ \_\_\_\_\_

4. Estimated Estate Value \$ \_\_\_\_\_

Please remember to bring a current family photo, childhood family photo, and small memento or heirloom, if possible, to our conference.

***“Quality is not an act. It is a habit”-Aristotle***

**For more information, please visit our website  
[www.blazeklaw.com](http://www.blazeklaw.com)**

