



Bridgeway Wealth Partners

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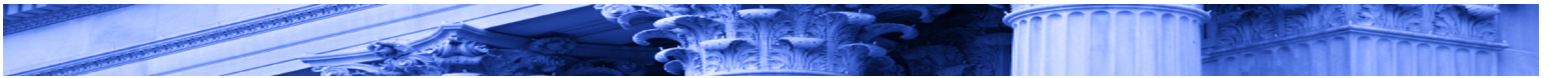
Estate Planning Checklist





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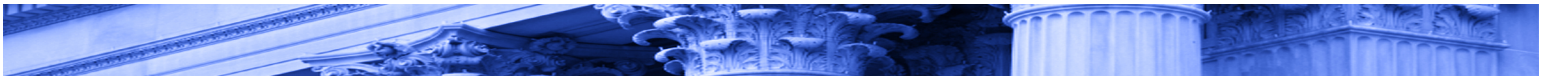
General information	Yes	No	N/A
1. Has relevant personal information been gathered? • Personal details • Family details • Current advisory team • Goals and expectations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has financial situation been assessed? • Assets • Liabilities • Life insurance policies • Other insurance coverage • Income • Expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Have current documents been reviewed? • Will • Trust documents • Power of attorneys • Medical directives • Insurance policies • Buy-sell agreements • Deeds, leases, mortgages, and land contracts • Guardian nominations • Separation/divorce agreements • Tax returns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Have funeral arrangements been made?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
Basics	Yes	No	N/A
1. Is there currently a valid will?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. If yes, does will reflect current goals and objectives?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does choice of executor remain appropriate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Has durable power of attorney been executed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Have medical directives been executed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Have beneficiary designations for retirement plans and life insurance policies been reviewed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Has impact of probate been considered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Notes:			
Trusts	Yes	No	N/A
1. Is the use of a living trust appropriate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is the use of a testamentary trust appropriate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Is the use of an irrevocable life insurance trust appropriate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Do existing trusts, if any, continue to meet overall objectives?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
Estate tax	Yes	No	N/A
1. Has estate plan been reviewed due to changing tax laws?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has impact of estate tax been evaluated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Have options to minimize estate tax been explored? <ul style="list-style-type: none"> • Lifetime gifting • Full use of basic (applicable) exclusion amount and marital deduction • Qualified terminable interest property (QTIP) elections • Qualified domestic trust (QDT) for noncitizen spouse • Charitable giving • Grantor retained trusts • Family limited partnership (FLP)/limited liability company (LLC) 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
Lifetime gifting	Yes	No	N/A
1. Have gifts been made?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has a lifetime gifting strategy been implemented?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Are gift tax consequences understood?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Has consideration been given to types of property suitable for gifting?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



5. Is valuation discount planning understood?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
Charitable intentions			
1. Have charitable gifts or bequests been planned?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is a charitable trust appropriate? <ul style="list-style-type: none"> • Charitable lead trust • Charitable remainder trust • Pooled income fund • Private foundation • Donor-advised fund 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Is a charitable gift annuity appropriate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is the charitable gift of a remainder interest in a home or farm appropriate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
Life insurance issues			
1. Have liquidity needs of estate at death been evaluated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is current life insurance coverage appropriate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Have steps been taken to keep life insurance proceeds out of taxable estate? <ul style="list-style-type: none"> • Policy ownership • Irrevocable life insurance trust 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Have beneficiary choices been evaluated in light of overall estate plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
Business interests			
	Yes	No	N/A



1. Have provisions been made to transfer business interest? • Buy-sell agreement and necessary funding • Sell business • Transfer business with lifetime gifts • Key person buyout	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is liquidation an option?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			

Bridgeway Wealth Partners, LLC is an SEC Registered Investment Advisory Firm.

Securities brokerage services provided by the entity detailed in your Advisors Part 2B of Form ADV: Brochure Supplement in Item 4: Other Business Activities. Insurance products by the entity detailed in your Advisors Part 2B of Form ADV: Brochure Supplement in Item 4: Other Business Activities. Though there are similarities among these services, the investment advisory programs and brokerage services offered by Bridgeway's advisors are separate and distinct, differ in material ways and are governed by different laws and separate contracts with you. A copy of Bridgeway Wealth Partners, LLC's current written disclosure statement discussing advisory services and fees is available for review upon request. The information contained in this e-mail message is intended only for the personal and confidential use of the recipient(s) named above. If the reader of this message is not the intended recipient or an agent responsible for delivering it to the intended recipient, please notify us immediately by e-mail, and delete the original message without any review/dissemination thereof.

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