



Basic Informational Estate Planning Workbook



“Building
Confidence
For Life”





Why Is Estate Planning Important

In the years ahead, Pilots will transfer an unprecedented amount of wealth to their heirs. Many pilots will pay more than their fair share of estate tax. How can you be sure that your estate passes on to the next generation in the most tax-efficient manner possible? At Aviation Retirement Strategies, LLC, we help you create an Estate Plan designed to meet your specific financial objectives such as funding higher education for future generations and/or providing for loved ones' futures.

Along with your **Handcrafted Retirement Wealth Plan** that ARS provides to retiring Crew Members, we will also help you design your Estate Plan. Although we are not attorneys, we do work side by side with Estate Planning Attorneys who fully understand Airline Crew Members and their unique needs. Whether it is a Simple Will or a Tax Planning Will, by providing our attorney with your estate plan design, **we save pilots numerous hours of attorney billing time**. Although the actual written documents are not po-bono, you pay our negotiated document drafting rates directly to the estate planning attorneys, **saving you hundreds, possibly thousands of dollars**.

During the entire process, we will act as the liaisons between you and the attorneys, making the process simple and effortless for you and your family. Your Estate Plan will actually become a part of your overall Retirement Wealth Plan, specifically designed for you.

Common Reason To Have An Estate Plan

- Creating/Updating Wills
- Creating a Living Trust
- Tax Planning
- Second To Die Life Insurance (For Tax Reasons)
- Health Care Planning
- Beneficiary Planning
- Healthcare/Business Agents
- Powers of Attorney

Designing Your Estate Plan

The following pages are designed to help you organize your thoughts and to begin thinking about who you feel might be appropriate for certain functions, for when the time comes that your estate needs taking care of. If needed, and of course with your permission, this information can be passed on to an Estate Planning Attorney. An Estate Planning Attorney will interview you and give suggestions on how to proceed, depending on your specific situation. At ARS, our trusted attorneys **will not charge for this service**.

Should you want to proceed, the **cost for your Estate Plan will be at our corporate rate**, which is usually significantly lower than the retail rate. Of course, should you have your own attorney, you are welcome to take this information to them as well. We simply need to review your documents for the purpose of proper titling of your assets inside your **Retirement Wealth Plan**.



PILOT'S INFORMATION

Name: _____ Date of Birth: _____
 Current Address: _____
 City: _____ County: _____ State: _____ Zip: _____
 Home : _____ Cell : _____ Fax: _____
 Email: _____

SPOUSE'S INFORMATION

Name: _____ Date of Birth: _____
 Current Address: _____
 City: _____ County: _____ State: _____ Zip: _____
 Home : _____ Cell : _____ Fax: _____
 Email: _____

DEPENDENTS & BENEFICIARIES

Name: _____ Dep/Ben/Both: _____ Relationship: _____ D.O.B.: _____ %: _____
 Name: _____ Dep/Ben/Both: _____ Relationship: _____ D.O.B.: _____ %: _____
 Name: _____ Dep/Ben/Both: _____ Relationship: _____ D.O.B.: _____ %: _____

EXECUTORS (THESE ARE ALL ALTERNATES AFTER SPOUSE)

1) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

2) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____



EXECUTORS (THESE ARE ALL ALTERNATES AFTER SPOUSE AND CAN BE THE SAME INDIVIDUAL)

1) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

2) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

TRUSTEES (THESE ARE ALL ALTERNATES AFTER SPOUSE AND CAN BE THE SAME INDIVIDUAL)

1) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

2) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

GUARDIANS FOR MINOR CHILDREN (THESE ARE ALL ALTERNATES AFTER SPOUSE AND CAN BE THE SAME INDIVIDUAL)

1) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

2) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____



HEALTHCARE AGENTS (HUSBAND) (THESE ARE ALL ALTERNATES AFTER SPOUSE AND CAN BE THE SAME INDIVIDUAL FOR BUSINESS AND HEALTH)

1) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

2) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

HEALTHCARE AGENTS (WIFE) (THESE ARE ALL ALTERNATES AFTER SPOUSE AND CAN BE THE SAME INDIVIDUAL FOR BUSINESS AND HEALTH)

1) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

2) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

BUSINESS AGENTS (HUSBAND) (THESE ARE ALL ALTERNATES AFTER SPOUSE AND CAN BE THE SAME INDIVIDUAL FOR BUSINESS AND HEALTH)

1) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

2) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____



BUSINESS AGENTS (WIFE) (THESE ARE ALL ALTERNATES AFTER SPOUSE AND CAN BE THE SAME INDIVIDUAL FOR BUSINESS AND HEALTH)

1) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

2) Name: _____ Date of Birth: _____

Current Address: _____

City: _____ State: _____ Zip: _____

Home : _____ Cell : _____

AGES FOR PRINCIPAL DISTRIBUTION FROM A CHILD'S TRUST

DEFAULT

33% at age 25
 33% at age 30
 34% at age 35

Alt. #1

____ % at age ____
 ____ % at age ____
 ____ % at age ____

Alt. #2

ALL at age ____

CONTINGENT DISTRIBUTIONS

DEFAULT : 1/2 to Husband's Heirs & 1/2 to Wife's Heirs

ALTERNATIVE : _____

TERMINATE LIFE SUPPORT UPON A TERMINAL CONDITION

HUSBAND : YES NO

WIFE : YES NO

TRUST
PARTNERSHIP
OBJECTIVITY
INDEPENDENCE



Please contact us for more information about Aviation Retirement Strategies, LLC.
and our wide range of retirement wealth planning strategies for Airline Pilots.



AVIATION
RETIREMENT
STRATEGIES

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Please visit our website for a complete list of services
www.PILOTMONEY.com

