



FORTRESS MEGA LLC

End of Life Checklist

Washington State

What is your goal?

1. Do you have your end of Life Documents? Yes No
2. Is someone designated to take care of your estate and final wishes? Yes No
3. Do you have initial liquidity to pay bills? Yes No
4. What if this is coming at you earlier than expected?
5. Review the National Institutes on Aging Checklist.

*We will all pass, but
planning ahead can make
the process easier and
less burdensome.*





End of Life Documents – Trusts, Wills and POAs

- Do you understand how a Will works? Yes No
- Do you understand how a Power of Attorney or POA works? Yes No
- Do you understand how basic trusts work such as a revocable living trust? Yes No
- Do you have more advanced needs such as special needs children or estate taxes? Yes No
- Do you have funeral arrangements? Please explain.
- What about Long Term Care Planning? Yes No
- Have you done your documents? Yes No
- Have you told someone where to find these documents? Yes No
- Where are those documents?
- Which did you choose?

Document Management

Someone has to manage all of these end of life documents, who is going to do it for you?

- Can a family member do it? Yes No
- What about in 20 years? Yes No
- Do you need Professional Trust Services? Yes No
- Do you know the general costs? Yes No
- Do you know how to set this up? Yes No
- Who did you choose?

Tax Planning

Washington State and Federal Estate Taxes

- Federal Estate Tax Exemption
- Washington State Estate Tax Exemption
- What is your expected Estate at Death?
- Did you trigger Federal Estate Taxes? Yes No
- How much?
- Did you trigger Washington State Estate Taxes? Yes No
- How much?
- Do you have a liquidity problem? Yes No
- Do you need a Credit Shelter Trust? Yes No

Notes

Investment advisory services provided by Regal Investment Advisors LLC, an SEC registered investment adviser. Regal Investment Advisors is independent of Fortress Mega, LLC. Advisory services are only offered to clients or prospective clients where Regal and its representatives are properly licensed or exempt from licensure. SEC registration does not imply a certain level of skill or training. The information presented is general in nature and should not be considered to be investment, legal, tax, accounting, consulting, or any other professional advice. It is not a solicitation of, or an offer to buy or sell, any securities or advisory services. The purpose of the information presented on this website is to educate and inform. The content is developed from sources believed to be providing accurate information. In all cases, you should consult with a professional familiar with your particular situation for guidance concerning specific financial matters before making any decisions.

Certified Financial Planner Board of Standards Inc. owns the certification marks CFP®, Certified Financial Planner™ and CFP® in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements.