



WALDEN & PFANNENSTIEL LLC
ESTATE PLANNING ATTORNEYS

WEBCLASS WORKBOOK

**Estate Planning for Busy Families
With Attorney Cassie Pfannenstiel**

KSestate-Probate.com



HOW TO GET VALUE FROM THIS WORKBOOK

1

Print this workbook out and refer to it throughout the webclass so you are staying engaged and have a place to take notes.

2

Write your questions down as you think of them so you can ask them live at the end of the event.

3

Think about what you want your estate plan to accomplish, and the people you want to benefit from it - they are why you are here!



Question #1

The 3 Biggest Doubts About Estate Planning

1. Planning for death will _____ its occurrence.
2. It will _____ and I _____.
3. I'm not _____ enough or _____ enough.

Notes and Questions:



Question #2

Who Is Estate Planning For?

Estate Planning isn't about _____.

It's about _____.

Who are the people you are planning for? List them here.

- 1.
- 2.
- 3.

Notes and Questions:



Question #3

Guardians For My Minor Children

If I don't nominate legal guardians for my minor children in a Will, a _____ will choose them for me.

Notes and Questions:



Question #4

What Are The 3 Ways You Can Own Property?

1. _____ (just one owner)
2. _____ (two or more owners)
3. By _____ (pursuant to a set of instructions)

Notes and Questions:



Question #5

What Are Your 2 Estate Planning Options?

1. Last Will & _____.

2. Revocable _____.

Which one avoids Probate Court?

_____.

Notes and Questions:



Question #6

What Are The 3 Downsides To Probate Court?

1. It's _____, costing an average of \$6k - \$10k + or 2-5% of the total estate depending on the circumstances.
2. It _____, usually 12-18 months, if not longer.
3. It's a _____ process, leaving your children vulnerable to predators.

Notes and Questions:



Question #7

What Is a Revocable Living Trust?

A Revocable Living Trust is a fancy Will.

It's like a kid's _____.

It avoids probate for all things

_____.

Notes and Questions:



Question #8

What Is a Children's Trust?

A Children's Trust is like a

-----.

It protects your children's inheritance from lawsuit, bankruptcy, and -----.

Notes and Questions:



Question #9

What Happens At The Empowering Estate Education Discussion?

1. Answer your _____, discuss your _____.
2. Discuss your _____.
3. Review packages and _____.
4. Decide if we are a _____ to work together.
5. Discuss _____.

Notes and Questions:



Question #10

How Can I Claim My Discount?

1. If I book my Empowering Estate Education Discussion in the next _____ hours.
2. To take place in the next _____ weeks
3. Sign a representation agreement within _____ days

I will save \$_____ off my comprehensive estate plan package planning.

Notes and Questions:



Thank You!

I'm Cassie (KC). I am an estate planning attorney, here to help protect you should you be unable to speak for yourself, your family, and your assets through thoughtful estate planning. I am passionate about educating my community on the value and benefits of proper planning.

I want to spread the word - estate planning is for EVERYONE.

My goal is to make the process as comfortable as possible and provide you with the advice to make your estate plan a reflection of what is most important to you. *Estate planning is not a one-size-fits-all - you are unique, your family is unique, your estate plan should be too.*

Cassie Pfannenstiel

Schedule Your Empowering Estate Education Discussion

<https://ksestate-probate.com/schedulenow/>

You can expect to feel reassured and confident after our discussion knowing that you're taking the steps to give you peace of mind knowing your loved ones are taken care of even after you're gone.



CHEAT SHEET

1. Hasten, Take Too Long, Don't Have The Time,
Old, Wealthy
 2. You, The People You Love
 3. Judge
 4. Individually, Jointly, By Contract
 5. Testament, Living Trust
 6. Expensive, Time-Consuming, Public
 7. Backpack, Inside The Backpack
 8. Tube of Paint, Divorce
 9. Questions, Goals, Options, Flat Fees, Good Fit,
Next Steps
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