Beginning the Estate Planning Process

What you need to teach and references to get it done

Step 1: Start the Conversation
- CoupleTALK: Enhancing Your Relationship, MF3223
- FamilyTALK: Making it Work, MF2995

Step 2: Determine your Estate Value
- How are you doing? A Financial Checkup, MF2721

Step 3: Set Goals
- Farm and Ranch Strategic Planning (Visioning and Goal Setting), MF2695
- How are you doing? A Financial Checkup, MF2721
- Transition Planning: 12 Steps to Keep the Family Farming, MF3074
- Estate Planning Goals, MF3453

Step 4: Advanced Directives
- Advance Health Care Planning in Kansas, MF3280
- Decisions After a Death, MF3122
- Decisions After a Death: Practical Suggestions Regarding Financial and Legal Matters, MF3123

Step 5: Get Professional Help
- What Your Attorney Should Know, MF3454
- Kansas Ag Mediation (Website includes some great videos)
- Kansas Bar Association
- Kansas Legal Services

Step 6: Share the Plan
- Our Valuable Records, MF685

Step 7: Review and Modify

Other Resources
- Powerpoint — Located at https://www.k-state.edu/family-finances/
- Stepping Stones for Step Families: Understanding Financial and Legal Matters, MF2238E
- Estate Planning Terms, MF3468
- Estate Planning Evaluation

Kansas State University Agricultural Experiment Station and Cooperative Extension Service