

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-finance/>
- *Stepping Stones for Step Families: Understanding Financial and Legal Matters*, MF2238E
- *Estate Planning Terms*, MF3468
- Estate Planning Evaluation