

Florida Estate Planning Readiness Checklist

A respectful preparation guide for goals, people, documents, asset categories, and questions before speaking with an attorney.



Prepared for **Sweetwater Law Offices, PLC**

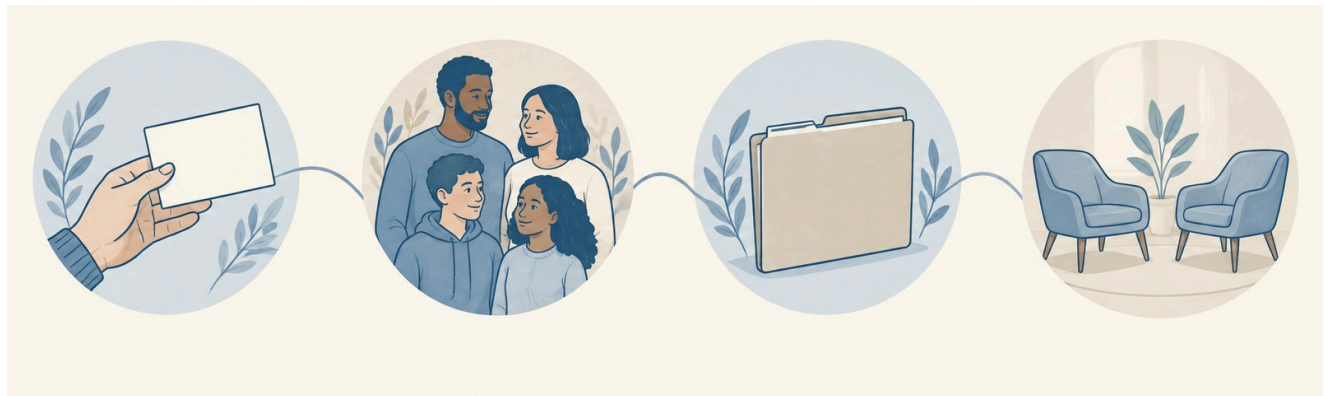
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1 Begin with a calm plan

Planning can begin with a conversation. You do not need to choose a will, trust, entity, tax strategy, or other legal tool before an attorney understands your circumstances.

A helpful reminder. Thoughtful planning is an act of care. Begin with the people and responsibilities that matter to you, then let qualified counsel help determine the appropriate legal tools.



Reflect	Locate	Discuss
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1.1 Prepare at your own pace

- ☐ Write one sentence about why you are considering a planning review now.
- ☐ List family members, dependents, business partners, and possible decision-making roles using names and relationships only.
- ☐ Locate existing wills, trusts, powers of attorney, healthcare documents, beneficiary designations, and business agreements.
- ☐ Create a high-level list of asset and obligation categories without account numbers, passwords, or confidential details.
- ☐ Keep this private working checklist secure and do not upload sensitive estate, health, financial, or tax information through an initial form.

Preparation notes

2 Free information you can use

The short subjects below support both careful reading and quick scanning. Mark the topics that matter now, then return to the others when they become useful.

Taking inventory of existing documents

Locate wills, trusts, powers of attorney, healthcare documents, and business agreements.

Decision-making roles to discuss

Prepare general questions about financial, healthcare, estate, and trust-administration responsibilities.

Ownership and beneficiary review

Place account ownership and beneficiary designations on the discussion list for an attorney.

Asset and obligation categories

Create a high-level private map without recording account numbers, passwords, or balances.

Business and succession questions

Organize ownership, continuity, and successor topics that may need separate analysis.

Preparing for the initial consultation

Bring goals, documents, asset categories, and questions without submitting sensitive information.

2.1 Published services or program areas to confirm

Use this list as a conversation guide. Availability, eligibility, scope, pricing, and location details can change.

- Estate planning and probate
- Asset-protection planning
- Charitable planning
- Taxation
- Business law
- Business and succession planning

Topics I want to discuss

3 Questions to bring with you

- ☐ Which planning topics are relevant to my circumstances?
- ☐ Which existing documents should the attorney review?
- ☐ How do ownership and beneficiary designations interact with the plan?
- ☐ Which decision-making roles need to be discussed?
- ☐ Which business, succession, tax, charitable, or asset-protection questions need separate analysis?
- ☐ What scope, process, timing, and fees should I expect if I engage the firm?

My priority question:

Conversation notes:

3.1 Contact and verify current information

Sweetwater Law Offices, PLC

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(407) 869-1680 · [Official website](#)

Operational details were reviewed in September 2026. Confirm current information before relying on it.

- [Official firm website](#)
- [Official services page](#)
- [Official contact page](#)

Important notice. General educational information only and not legal or tax advice. Using or downloading this guide does not create an attorney-client relationship. Individual facts determine whether any planning tool is appropriate. Keep this private checklist secure and do not submit sensitive estate, health, financial, or tax information through an initial form.