

ESTATE PLANNING CHECK-UP

Please circle your responses to the following:

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| 1. I have a current Health Care Power of Attorney to permit my spouse, children and/or family to make emergency health care decisions for me in the event I am unable to do so. | Yes | No | Don't Know |
| 2. I have a current Durable Power of Attorney to possibly permit my spouse, children, and/or family to handle my financial affairs in the event I become disabled. | Yes | No | Don't Know |
| 3. My Revocable Living Trust or Power of Attorneys specify a comfortable test to determine my disability? | Yes | No | Don't Know |
| 4. My Revocable Living Trust that is in place as part of my estate plan gives instructions for my care and the care of my loved ones? | Yes | No | Don't Know |
| 5. I am certain that my current estate plan will minimize possible federal estate taxes at my death, including taxes on my house, life insurance and IRA's. | Yes | No | Don't Know |
| 6. My Revocable Living Trust that is in place as part of my estate plan, is fully funded so that my family can avoid the delays and expenses of probate. | Yes | No | Don't Know |
| 7. I have taken steps to avoid possible will contests and disputes at my death. | Yes | No | Don't Know |
| 8. I have taken steps to protect my children's inheritance in the event my surviving spouse chooses to remarry. | Yes | No | Don't Know |
| 9. I have recently checked the beneficiary designations of my retirement plans and life insurance policies, and I am confident that I have not listed my estate or any minor children as either primary or secondary beneficiaries. | Yes | No | Don't Know |
| 10. I have a plan to provide creditor and lawsuit protection for assets passed to my surviving spouse. | Yes | No | Don't Know |

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| 11. Does your current plan provide creditor and lawsuit protection for your children's inheritance? | Yes | No | Don't Know |
| 12. Does your current plan address income tax planning? | Yes | No | Don't Know |
| 13. I have a plan to protect my children's inheritance from a divorcing spouse. | Yes | No | Don't Know |
| 14. I am satisfied with the persons I named as guardians of my minor children in my current plan. | Yes | No | Don't Know |
| 15. I am satisfied with the persons I named as executor in my current plan. | Yes | No | Don't Know |
| 16. I am satisfied that my current plan sets up a contingent trust for my minor children. | Yes | No | Don't Know |
| 17. I am aware of all future estate planning fees and expenses and have my updating and estate settlement expenses agreed upon in writing. | Yes | No | Don't Know |

If you answered No or Don't Know to any of the above questions you will benefit from a complimentary one-hour review of your estate plan.

I am referring you to:

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Referring Signatures:

Financial Advisor: _____

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