

LIFE & ESTATE PLANNING QUESTIONNAIRE

PLEASE CIRCLE your responses to the following questions, unless not applicable to your situation. Your responses will remain confidential.

- | | <u>Please Circle One</u> | | |
|--|---------------------------------|-----------|-----------------|
| | Yes | No | Not Sure |
| 1. I am confident that I would not be subject to an expensive and embarrassing "Guardianship & Conservatorship" in the Probate Court in the event I ever become disabled or incapacitated. | Yes | No | Not Sure |
| 2. I have a comprehensive Life & Estate Plan in place so my family can avoid the delays and expenses associated with Probate at my death. | Yes | No | Not Sure |
| 3. I have executed legal documents giving my family access to my medical records and authority to make my health care/life support decisions if I am unable to do so myself. | Yes | No | Not Sure |
| 4. I have legally named the Guardian ("back-up parents") for my minor children. | Yes | No | Not Sure |
| 5. I have made binding legal arrangements to protect the inheritance of my children from their potential future divorces, lawsuits, creditors and/or bad judgment. | Yes | No | Not Sure |
| 6. I have made binding legal arrangements to protect the inheritance of my children, from a prior marriage or otherwise, in the event my surviving spouse remarries. | Yes | No | Not Sure |
| 7. I have taken steps to prevent the IRS from taking between 37% and 55% of my life insurance proceeds from my family. | Yes | No | Not Sure |
| 8. I have a comprehensive Life & Estate Plan that may allow my family to save \$200,000 or more in Federal Estate Taxes. | Yes | No | Not Sure |

9. I have made legal arrangements to protect my business interests in the event of “disagreement, disability, retirement and/or death. Yes No Not Sure
10. Given the choice, I would rather my tax money go to the charity(ies) of my own selection rather than to the IRS. Yes No Not Sure

Q: Of the 10 questions above, how many of your answers were either “No” or “Not Sure”?

A: _____ questions.

Which three of the 10 questions above are of greatest concern to you today?

PLEASE CIRCLE these three “question numbers” and we will address them during your confidential consultation.

Date: _____

Signature

Signature

Printed Name

Printed Name