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Legacy Planning Assessment

Please check Yes or No for each question to determine your legacy planning preparedness.

	Yes	No
<ul style="list-style-type: none">• Have you gathered your important papers together in one place, including birth certificates, marriage certificate, divorce decree, death certificate of prior spouse, military papers, insurance policies, retirement account statements, vehicle titles, real estate records, tax records, and estate planning documents?• Have you thought about how you want your assets distributed after your death?		
<ul style="list-style-type: none">• Have you written a letter of instructions to be read immediately after your death explaining where everything is and what family members should do first?		
<ul style="list-style-type: none">• As of now, between account titling, beneficiary designations, your will and your trust, do you know where your assets would go if you were to die tomorrow? Is it what you want?		
<ul style="list-style-type: none">• Is your current estate plan set up to minimize taxes and fees?		
<ul style="list-style-type: none">• Are your beneficiaries prepared to handle their inheritance – that is, do they know how to minimize taxes and invest for the future?		
<ul style="list-style-type: none">• Have you signed a health care directive appointing someone to convey your wishes to doctors if you are unable to speak for yourself?		
<ul style="list-style-type: none">• Have you signed a power of attorney appointing someone to handle your financial affairs should you become unable to do so?		
<ul style="list-style-type: none">• Have you organized your family photos, written down your family stories, scheduled some time to teach children and grandchildren what you've learned over your lifetime, and made a list of your most important values and ideals?• Do you know what you will be remembered for?		

Even one No answer indicates you have work to do! Let us help you get started.

Name: _____

Email: _____