

ESTATE PLANNING CHECK UP

Client Name: _____ **Financial Advisor:** _____

Please circle your responses to the following:

- | | | | | |
|-----|---|-----|----|------------|
| 1. | I currently have a valid Will. | Yes | No | Don't Know |
| 2. | My Will has been updated within the past Ten (10) years. | Yes | No | Don't Know |
| 3. | Since I executed my Will, I have had children. | Yes | No | Don't Know |
| 4. | Since I executed my Will, I have become a grandparent. | Yes | No | Don't Know |
| 5. | Since I executed my Will, one of my children has married. | Yes | No | Don't Know |
| 6. | I have minor children and I am comfortable with the persons I named as Guardians of my minor children in the event of my death. | Yes | No | Don't Know |
| 7. | My Will has provisions for the creation of a Trust at the time of my death, in order to invest and manage my assets for my children. | Yes | No | Don't Know |
| 8. | The executors or personal administrators I named in my Will are still living and capable and willing to serve as my executor or personal administrator. | Yes | No | Don't Know |
| 9. | Since I executed my Will, I have remarried. | Yes | No | Don't Know |
| 10. | Since I executed my Will, I have acquired substantial additional assets. | Yes | No | Don't Know |

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ESTATE PLANNING CHECK UP (*Cont'd)

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|-----|--|-----|----|------------|
| 11. | Since I executed my Will, I started or became an owner of a new business enterprise, either individually or jointly with another person. | Yes | No | Don't Know |
| 12. | Since I executed my Will, children or dependents have incurred special needs for which future plans need to be made. | Yes | No | Don't Know |
| 13. | Since I executed my Will, I obtained or purchased annuities or life insurance policies. | Yes | No | Don't Know |
| 14. | I have a current Power of Attorney document to permit my spouse, or someone else on my behalf, to handle my financial affairs in the event I become disabled or unavailable to handle those affairs. If so, I am comfortable with the persons named in that Power of Attorney. | Yes | No | Don't Know |
| 15. | Since the beginning of 2007, I have executed a Health-care Power of Attorney to permit my spouse, children and/or family and friends to make emergency healthcare decisions for me in the event I am unable to do so. | Yes | No | Don't Know |
| 16. | I am comfortable that my net estate is less than the current Federal Estate Tax exclusion amount. | Yes | No | Don't Know |
| 17. | I am interested in meeting with an estate planning attorney to review my current estate plan to determine if there is any need for changes. | Yes | No | Don't Know |

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