



## HOW PREPARED ARE YOU?

- Yes  No Do you have a current will?
- Yes  No Does your will state your current preferences for the Guardian of your minor or incompetent children and waive bond for those persons?
- Yes  No Does your will state your current preferences for the executor and alternate executor of your estate and waive bond for those persons?
- Yes  No Have you considered a limited or general power of attorney for your heirs?
- Yes  No Do you have a healthcare power of attorney or living will?
- Yes  No Have you written down your funeral and burial preferences and discussed them with your survivors?
- Yes  No If you have an expensive hobby (coins, antiques, guns) could your survivors locate important information about it?
- Yes  No Do you have a business?

If Yes, how is ownership of the business titled? \_\_\_\_\_

Yes  No Can the business effectively function in the event of your death?

Yes  No Do you have a current buy/sell agreement?

Is the buyout funded or will assets of the business have to be liquidated or sold to pay your heirs? \_\_\_\_\_

What is the value of your estate? \_\_\_\_\_

- Yes  No Will the survivors have enough liquid cash/ insurance to pay estate taxes, or will they have to liquidate capital to pay taxes?
- Yes  No If you have any pets have you made arrangements for their care when you die?
- Yes  No Are your children capable of managing large sums of money after your death?
- Yes  No If there are any assets that you would not want sold after your death, is that information written in your will?

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- Yes  No Do you know how to set up and live on a budget?
- Yes  No Have you made arrangements for pension distributions in the event of you or your spouse's death?
- Yes  No Are there current beneficiary designations on all of your payable on death assets (life insurance, annuities, pension and retirement plans, POD bank accounts, IRA's)?

Could your survivor locate your assets and important papers, including:

- Yes  No Bank accounts
- Yes  No Safe deposit boxes
- Yes  No Real estate papers, including deeds and mortgages
- Yes  No Wills, trusts, and powers of attorney
- Yes  No Life insurance policies
- Yes  No Birth certificates of all immediate family members
- Yes  No Death certificates
- Yes  No Marriage certificates
- Yes  No Divorce and child custody papers
- Yes  No Military discharge papers
- Yes  No Titles to cars and other motor vehicles
- Yes  No Tax returns
- Yes  No Cancelled checks
- Yes  No Stocks, bonds, contracts and notes
- Yes  No Annuities, death benefits and retirement plans
- Yes  No Social security numbers of all family members
- Yes  No List of all persons to notify when you die
- Yes  No Have you provided your executor with a list of your licensed financial advisor, lawyer, insurance agent and accountant?

In which area(s) do you feel the most unprepared in the event of your death?

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