

IS IT TIME FOR A REVIEW?

HOW DO YOU SCORE?

Is it time to review your will or trust? How often should you review your estate plan? This quiz will help you determine the health of your estate plan and whether it is time to schedule a checkup to ensure your loved ones are protected in the event of your death or disability.

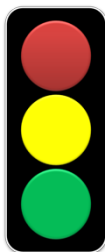
Fill out this quiz & schedule a meeting with our Estate Planning team **before April 1, 2019** to receive **\$100 OFF ANY AMENDMENT OR NEW ESTATE PLAN FEES.**

ESTATE PLAN REVIEW QUIZ

Please circle the answer that most fits your situation. Then, add up your points to determine your estate plan's health.

YES	NO	NOT SURE	
0	5	5	Do you have a will and/or trust that meets your goals in a protected, tax efficient manner?
0	5	5	Do you have powers of attorney and a living will in place?
0	5	5	Do you know who you have named to serve in your documents and are those people still whom you want to serve?
0	5	5	Do you know where your original documents are and does at least one other person know?
1	0	1	Have you had children or grandchildren since you created your plan?
2	0	1	Have you or your children been married or divorced since you created your plan?
1	0	1	Has your net worth significantly increased or decreased since you created your plan?
2	0	1	Have you started a business or acquired new real estate since you created your plan?
0	2	1	Are your goals for distribution of your estate the same?
1	0	1	Do you want to provide for your grandchildren's education in your plan? If so does your plan do this?
0	4	3	Are you leaving money to anyone with special needs or who is receiving benefits?
0	4	3	Does your plan effectively leave money to anyone with special needs or who is receiving benefits?
0	2	1	Do you understand your plan?
0	1	1	Do you know if (and how) your plan protects you and your family in the event of a disability?
0	1	1	Do you know the steps your loved ones need to take when you pass away and have you discussed the steps with them?
0	1	1	Are the tax laws and state/federal laws that your plan relies on still the same?
3	0	2	Has your state residency changed since you created your plan?
0	1	1	Does your plan protect your children in the event they get divorced after inheriting?
1	0	1	Do you have new or different accounts (stocks, CD's, bonds, investment) since creating your plan or have you added names to your accounts?
0	1	1	Does your plan protect your children in the event your spouse remarries?
4	0	2	Is your net worth 11 Million or more if your single or 22 Million or more if married (including life insurance)?
2	0	1	Has it been over 3 years since you reviewed or created your plan?
0	4	3	Are your beneficiary designations for retirement accounts or life insurance updated and correct?

TOTAL



5 or Over – Your plan may be in CRITICAL condition. Schedule a review today.

3 to 5 – Your plan may require ATTENTION. Schedule a review in the next 6 months.

0 to 3 – Your plan seems to be HEALTHY. Schedule a review in the next 1-2 years.

This quiz is not legal advice & only gives general information. For advice regarding your specific estate plan, please visit directly with an attorney