

PLEASE ANSWER THE FOLLOWING QUESTIONS CONCERNING YOUR ESTATE PLAN AND YOUR PERSONAL SITUATION.

PERSONAL CHECKUP

1. Do you have a will?
2. If you have a will, have you reviewed it recently to determine if changes need to be made because of a change in wishes, family dynamics, or other matters?
3. Do you have a living will? If so, have you recently reviewed it to make sure it reflects your wishes?
4. Do you have a medical power of attorney? If so, have you recently reviewed it to make sure it reflects your wishes?
5. Do you have a financial power of attorney? If so, have you recently reviewed it to make sure it reflects your wishes?
6. Have you explored whether a trust would be appropriate for you?
7. Have you recently reviewed who the beneficiaries are for your IRAs, 401ks, Keoghs, and any other retirement plans to make sure they reflect your wishes?
8. Have you recently reviewed who the beneficiary is for any life insurance that you have?
9. Have you recently reviewed how you hold title to all of your assets to make sure it is consistent with your estate plan?
10. If you are a blended family, have you spent time determining what should occur?
11. If you have minor children, have you reviewed who should be the guardian for your children if a guardian is necessary?
12. Have you taken the necessary steps for your estate plan to make sure that your children do not receive anything until they are mature enough to receive the inheritance?

13. Have you taken the necessary steps for your estate plan to make sure that any creditors of your children are unable to pursue the assets that your children inherit from you?
14. Have you planned for mental and/or physical incapacity?
15. Do you need life insurance?
16. Do you need disability insurance?
17. Do you need an umbrella insurance policy?
18. Has your personal situation changed which requires you to review your legal documents?
19. Have you made a list of all of your bank accounts, assets, debts and other financial information and informed your family where the list is?
20. Have you informed your family where your estate planning documents are?
21. Have you informed your family about your burial requests and whether you want to be cremated?

THE ABOVE QUESTIONS ARE NOT COMPREHENSIVE AND SOME MAY NOT APPLY TO YOUR PERSONAL SITUATION. THE QUESTIONS ARE INTENDED TO PROVIDE YOU WITH A LIST OF AREAS THAT YOU SHOULD REVIEW.

YOU SHOULD CONSULT WITH AN ATTORNEY AND RECEIVE LEGAL ADVICE AS IT RELATES TO YOUR OWN PERSONAL SITUATION.