

The 14-Point Checkup: Will Your Current Estate Plan Help You?

As you age, are you concerned about.....
Answer each question below and rank your top 3 concerns

	Yes	No	Unsure	N/A	<u>Rank Top 3</u>
The <u>cost</u> to you and your family if you delay creating a plan to secure your future?	_____	_____	_____	_____	_____
Running out of money?	_____	_____	_____	_____	_____
Being a burden?	_____	_____	_____	_____	_____
Protecting your spouse/children?	_____	_____	_____	_____	_____
Paying for long-term care?	_____	_____	_____	_____	_____
Being alone?	_____	_____	_____	_____	_____
Avoiding/minimizing taxes?	_____	_____	_____	_____	_____
The way your assets are distributed?	_____	_____	_____	_____	_____
Losing your independence as you age?	_____	_____	_____	_____	_____
Protecting your assets?	_____	_____	_____	_____	_____
Who will be your health and financial agents?	_____	_____	_____	_____	_____
Planning for blended families?	_____	_____	_____	_____	_____
Caring for others?	_____	_____	_____	_____	_____
Addressing family conflict?	_____	_____	_____	_____	_____
Other _____	_____	_____	_____	_____	_____