

Estate Planning Issues of Importance

Name: _____

Date: _____

What is Your Current Stress Level?

NO WORRIES

SOMEWHAT BOTHERED

CAN'T SLEEP AT NIGHT

1.....2.....3.....4.....5.....6.....7.....8.....9.....10

What Is Your Level of Urgency?

JUST LOOKING

WANT SOMETHING SOON

WANT IT DONE YESTERDAY

1.....2.....3.....4.....5.....6.....7.....8.....9.....10

RATE YOUR LEVEL OF IMPORTANCE ON THE FOLLOWING ISSUES:

Not Important

Somewhat Important

Extremely Important

Authorize someone to act for you legally (if you can't) 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Authorize someone to make your health-care decisions (if you can't) 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Protect assets for disabled beneficiaries (if occurs) 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Provide for minor beneficiaries (if children predecease you) 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Provide asset protection for your spouse after your death 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Provide for protection of assets if your spouse remarries 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Provide asset protection for children/beneficiaries from creditors & divorce 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Provide estate tax planning 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Provide detailed personal instructions for your loved ones 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Provide detailed disability instructions for me and my \$ 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Make your personal information (assets/beneficiaries) private 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Avoid probate 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Provide a plan for accident or unforeseen illness or prevent business failure, etc. 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

Provide asset protection for you during life (from lawsuits/nursing home) 1.....2.....3.....4.....5.....6.....7.....8.....9.....10

