



# Estate Planning Scorecard

Name: \_\_\_\_\_

Date: \_\_\_\_\_

To help you clearly understand your current situation, try the Estate Planning Scorecard. Rate your reactions to each pair of phrases. Decide where you lie on the scale from 1 to 10. Add up your total from each column. We will further discuss the scorecard in our initial consultation.

	1	2	3	4	5	6	7	8	9	10	
We are unsure if our estate plan will achieve our goals											We are confident our estate plan will achieve our goals
Our plan is out of date & not current with law changes & personal changes											We have a formal updating program to address changes
Our plan does not take advantage of tax laws											My plan eliminates or reduces as many taxes as possible
I am concerned what will happen to my spouse after I am gone											I am assured my spouse will be taken care of after I am gone
Our assets are not titled & coordinated with our estate plan											Our assets are coordinated to allow our estate plan to work
We do not have clear, written instructions on how we want our estate settled											We have clear written instructions on how we want our estate to be settled
Our family is not educated or prepared to settle our estate											Our family is well-educated & informed to settle our estate
We are not confident that our beneficiaries' inheritance is protected											We are confident that our beneficiaries' inheritance is creditor & divorce proof
I have not planned for the event of disability											We have a clear, written plan to handle disability
ADD COLUMN TOTALS											YOUR SCORE _____

## What 3 Things Could I Do to Immediately Improve My Score?

1.

2.

3.