

Estate Planning Wellness Quiz

(This quiz is a short list of questions to ask yourself in considering whether you need to attend to your estate planning. The quiz contains common questions that apply to most everyone. Even if you are satisfied with your answers to this quiz, if you are left with any doubts or questions that apply to your circumstances, not addressed in this quiz, I recommend you contact an estate planning attorney)

I have made arrangements to avoid the Probate of my assets upon my death.

YES NO

I have executed legal documents to avoid the need to have a Guardianship established for me in the event I ever become incapacitated or disabled.

YES NO

I have executed legal documents authorizing my family or a friend to have access to my medical records (especially in light of HIPAA rules) and the authority to make my health care/life support decisions if I am unable to do so for myself.

YES NO

I have executed legal documents that will ensure I will not be artificially kept alive or be provided artificial nutrition or hydration if my death is imminent or I will only be able to live in a permanent vegetative state.

YES NO

If applicable, I have executed legal document stating who I want to raise my children if something happened to me, so a judge would not have to make that decision.

YES NO

I have executed legal documents to protect my estate from otherwise unnecessary State and/or Federal Estate Taxes.

YES NO

I have executed legal documents to ensure that my beneficiaries' inheritance from me will not be exposed to creditors, divorce and bad investments.

YES NO

If applicable, I have executed legal documents to protect the inheritance of my own children, from a prior marriage or otherwise, in the event my surviving spouse remarries.

YES NO

If applicable, I have executed legal documents providing if something happened to me, my children would not receive their full inheritance from me at age 18 without any restrictions.

YES NO

I have executed legal documents to protect my business interests in the event of *disagreement, disability, retirement and/or death*.

YES NO

I have up to date executed estate planning documents reflecting my current choice for agents, executors, successor trustees and beneficiary designations.

YES NO

If you are not satisfied with any of your answers, it may be time to schedule an appointment with your attorney to review your estate planning. If you would like to meet with me, please [contact me](#) to schedule an appointment.