



Prospect: _____

Attorney: _____

Date: _____

CURRENT DOCUMENTS:

WILL YES NO
 SWEETHEART YES NO
 POA FOR HEALTHCARE YES NO
 DECLARATION OF GUARDIAN YES NO

LIVING WILL YES NO
 POWER OF ATTORNEY YES NO
 TRUST YES NO
 OTHER _____ YES NO

DOES YOUR CURRENT ESTATE PLAN?

1. **Authorize someone to act for you legally if you cannot?** YES NO
 Blank check? YES NO NA
 Expanded powers with instructions? YES NO NA
2. **Authorize someone to make your health-care decisions if you cannot?** YES NO
 God Power YES NO
 Rests with doctor? YES NO
 Perhaps
 Comply with HIPAA? YES NO NA
3. **Protect assets for disabled beneficiaries** YES NO
4. **Provide for minor beneficiaries if your children should predecease you?** YES NO NA
5. **Provide asset protection for your spouse after your death?** YES NO
6. **Provide for protection of assets if your spouse remarries after your death?** YES NO NA
7. **Provide asset protection for your children and/or beneficiaries for life from:**
 Creditors? YES NO
 Divorce? YES NO
8. **Provide estate tax planning:**
 For Federal Limits? YES NO
 For State limits? YES NO
9. **Provide detailed personal instructions for your loved ones? (Who gets what, when and how?)** YES NO Limited
 State's rule book applies? YES NO
 Your rule book applies? YES NO
 Simple trust (avoidance of probate)? YES NO
10. **Provide detailed disability instructions – what to do with me and my money in the event of my disability?** YES NO Limited
11. **Keep your personal information such as assets and beneficiaries private?** YES NO
12. **Require probate?** YES NO
 Possible
 2 Probates/ancillary? YES NO
 Possible
13. **Provide a plan for accident or unforeseen illness to prevent business failure, etc.?** YES NO
14. **Provide asset protection for you during your lifetime from lawsuits or nursing homes?** YES NO
15. **Provide advanced planning for:**
 Income tax? YES NO NA
 Protection of assets already transferred to children? YES NO NA
 Estate tax beyond federal/state limits? YES NO NA
 Business succession plan? YES NO NA
 Business succession plan? YES NO NA

Miscellaneous: _____