

Your Self-Assessment The Important First Step



There are many important issues that need to be considered in planning your Estate. Foremost among them is avoiding the costly errors that can easily erode tens of thousands of dollars from your Beneficiaries inheritance. Most people want to avoid paying court fees and huge sums of money to attorneys. The effort you apply to planning your Estate will enable you to avoid these unnecessary costs..

Most people who have not engaged in appropriate Estate Planning say that while they desire to complete a plan tailored to their needs, they simply do not know how to go about getting it done. Many fear the cost to be prohibitive. Our clients are pleasantly surprised to learn that setting up an Estate Plan tailored specifically for them is far less expensive than they would have thought.

Complete the following self-assessment to determine where you will need to focus your attention to complete your Estate Plan.

	YES	NO
<i>Has your Estate Plan been reviewed in the last 2 years?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have a Last Will & Testament?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have a Revocable Living Trust?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have a Probate Avoidance Plan?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have a Beneficiary Deed for your home?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have Investment Property?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you own property outside of Arizona?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you maintain Payable on Death Bank Accounts?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you maintain Transfer on Death Brokerage Accounts?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have a Financial Power of Attorney?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have a Medical Power of Attorney?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have a Living Will?</i>	<input type="checkbox"/>	<input type="checkbox"/>

	YES	NO
<i>Do you have a HIPPA Override to access Medical Records?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have a Long-term Care Spend Down Plan?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have an "Intent to Return Home" document?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you do an Annual Tax Savings Analysis?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Have you made your Final Arrangements?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you completely understand your Investments?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you have any heirs?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you maintain accounts in Joint Tenancy?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Is your Property Deed in Joint Tenancy?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Are you in a Second Marriage?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Have you inherited money or property?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do your children or heirs have substance abuse issues?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Are any family members in Long-Term Care?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do have Life-Insurance?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do have pets you wish to provide for after your death?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Are you concerned about your children's spouses?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Are you a Veteran or a beneficiary of Veteran's Benefits?</i>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Do you need help with your Estate Plan?</i>	<input type="checkbox"/>	<input type="checkbox"/>