

Risk Management

In the event of my death, my family could maintain its current standard of living.	Yes	No	Not Sure
I understand the difference between term and cash value life insurance.	Yes	No	Not Sure
I understand how to calculate the amount of life insurance I need.	Yes	No	Not Sure
I have income replacement coverage if I should become disabled.	Yes	No	Not Sure
WFBBOBMUF SOBUWFTPSDFPGDDPNFTIPMEFWSTGGFSBOFYUFOEFEEJBCMWZ	Yes	No	Not Sure
EFSTUBOEUIBU.FEDBSFHFOFSBMMZPFTOPUQBZPSMPOHUFNSDBSF	Yes	No	Not Sure
BNBSFPGUIFNQBDUPGMPOHUFNSDBSFDBOIBWFPONZBNMBOEOFUXSUI	Yes	No	Not Sure
WFFYDFTTMCWMC SFMMBOTS BODF	Yes	No	Not Sure
WFSFWFKENZPNFBUPBOEMBCWDTSBODFXIQUIFMBTUURZBST	Yes	No	Not Sure
SFOUOTS BODF -GFWBFNQMPZS -GFPVTEFFNQMPZSYBCMWZ			-POHUFNSBSF
5PUBM-GFOTS BODF@QPVF@			5FSNBTI7BMF
QQSPYBTI7BMF@QPVFTI7BMF@			
WFBBOFBMUIDPOEWPOTUIBUNBZGGFDUZYBCMWZPRBMGZPSOTS BODF :FT/P			4QPVF:FT/P

5BY1MBOODH

.DDPNFUBYFTBSFEPOFCZUBYQSPGFTTPOBM	Yes	No	
BNUBLDHBEBWOUBHFPGBMMBWBMB CMFUBYEFGFSSBMTBOEEFEDUPOT	Yes	No	Not Sure
WFB3PUIXIONZLNQMPZSSFUSFNFOUQMBO	Yes	No	Not Sure
BNBSFPGNBZCMWZPS3PUI3DPOWFSTPOTBOEUIFNQBDUPONZBYFT	Yes	No	Not Sure
WFBQMBOGPSUBYMPTTIBSWFTUOHONZDDPOUTUPSFEWDFDBQWBMHBOT	Yes	No	Not Sure
WFTHOGDBOUOUFOUGPSDIBSWBCMFHWOHONZDPNFBOEFTUBUFQMBOT	Yes	No	Not Sure
BNBSFPGNBZCMWZPDPOUSCVFTUPDLUPDIBSWBCMFPSHBOBUPOT	Yes	No	Not Sure
WFSQMBOUPVF2BMGFESWBCMFJUSCV POTBTQBSUPGNZ.%	Yes	No	N/A
PBCVDFTTBOEBNBSFPGZUPNWHBUFQFSTPOBMUBYBCMFDDPNF	Yes	No	N/A

Estate and Legacy Planning

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| 49. I have a valid Last Will & Testament according to state law. | Yes | No | Not Sure |
| 50. I have reviewed my estate plan with an attorney in the last three years. | Yes | No | |
| 51. I have the proper legal documentation to handle my financial and healthcare affairs in the event of my incapacity. | Yes | No | Not Sure |
| 52. I have reviewed my property and asset titling to ensure proper funding of my trust(s). | Yes | No | Not Sure |
| 53. I have ensured my beneficiary designations are up-to-date and are coordinated with my estate plan. | Yes | No | Not Sure |
| 54. I am aware of whether my estate is subject to estate taxes under current law. | Yes | No | Not Sure |
| 55. I am aware there may be estate tax liabilities at the state level separate from Federal estate taxes. | Yes | No | |
| 56. I have an up-to-date list of important personal documents and their locations. | Yes | No | |

I have the following: Will Trust Healthcare Directive Power of Attorney (Financial)

I would like to discuss and receive more information on:

- | | | |
|------------------------|------------------|----------------------------|
| Optimizing investments | College Planning | Mortgage Review |
| Retirement Planning | Estate Planning | Home/Auto Insurance Review |

Comments: