



SELF-ASSESSMENT: HOW PREPARED ARE YOU?

Estate Pre-Planning Awareness Check-In

Read each question and mark YES or NO. Give yourself 1 point for each YES and 0 points for each NO.

#	QUESTION	YOUR ANSWER
1	Do you have a current will?	YES ____ NO ____
2	If you have a trust, is it properly funded and current?	YES ____ NO ____
3	Do you have a Durable Financial Power of Attorney?	YES ____ NO ____
4	Have you documented your healthcare wishes?	YES ____ NO ____
5	Are your life insurance and retirement beneficiaries current?	YES ____ NO ____
6	Does somebody know where your important documents are?	YES ____ NO ____
7	Could your family locate your life insurance information tonight?	YES ____ NO ____
8	Do they know your final-arrangement wishes?	YES ____ NO ____
9	If you have minor children, have you addressed guardianship?	YES ____ NO ____
10	Do you have a plan for your important digital information?	YES ____ NO ____
11	If something happened to you tonight, would your family know what to do tomorrow morning?	YES ____ NO ____

YOUR SCORE

Total _____

11 points -- Sounds like you're on top of it!

10 - 5 points -- May need a little more preparing

4 - 0 point -- May need a lot more preparing

For educational and estate pre-planning awareness purposes only. This self-assessment is not legal, tax, or financial advice and does not determine whether your estate plan is legally complete.