



## LEGAL DOCUMENT AUDIT

### **Basic Audit:**

1. Do you have a **PROFESSIONALLY PREPARED WILL**? Yes  No

If it is a do-it-yourself will?

Yes  No

Has your will been reviewed by knowledgeable legal counsel to evaluate its appropriateness?

Yes  No

2. Has **YOUR WILL BEEN UPDATED OR REVIEWED** during the past 5 years to make sure it reflects changes in your situation (e.g. the appropriate beneficiaries, executors, etc.)?

Yes  No

3. Do you have a **FINANCIAL POWER-OF-ATTORNEY** in the event of incapacity for any reason?

Yes  No

4. Do you have an **ADVANCED MEDICAL DIRECTIVE** so those you designate can talk with medical personnel?

Yes  No

If yes, does the directive include someone in addition to your spouse?

Yes  No

5. Do your assets contain **TRANSFER-ON-DEATH INSTRUCTIONS** so that your assets can avoid probate court expenses, delays and claims by creditors?

Yes  No

Or is another plan more suitable for your situation?

Yes  No

6. Are all important documents, such as life insurance policies, deeds, titles, investment accounts, and other legal documents listed in an organized manner?

Yes  No

If yes, Do family members or executors know the location of these documents, and can they be easily accessed?

Yes  No

***Advanced Audit:***

7. Should I consider a **PROBATE AVOIDANCE TRUST** which will provide for the administration of my assets during times of incapacity and avoid Probate upon death?

Yes  No

8. Is my estate large enough to require a **TAX SHELTERED TRUST** to avoid or limit State and Federal taxes?

Yes  No

9. Do I need an **IRREVOCABLE TRUST** to protect assets from the catastrophic costs of long-term care or to pay my estate taxes?

Yes  No

10. Do I have an **INTEGRATED ASSET PROTECTION** plan?

Yes  No