

# JANE L. WILLIAMS, LLC

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## DETERMINING YOUR CURRENT ESTATE PLANNING STATUS

1. Do you have a will or a Trust in place?  
Without proactive planning, state laws will determine how your assets pass, to whom they pass, and when they pass. This can lead to undesired results and is, perhaps, the most costly way to pass assets to loved ones. Yes   No   Don't Know
  
2. Has your Will or Trust been reviewed in the last two years?  
Even assuming that there have been no family or financial changes since your plan was last reviewed, there have been several major tax law changes. An out-of-date estate plan can be worse than no plan at all. Yes   No   Don't Know
  
3. Does your current Health Care Power of Attorney permit the person of your choosing to make emergency health care decisions for you in the event you are unable to do so? Yes   No   Don't Know
  
4. Does your estate plan contain a customized plan to determine if you are mentally disabled? Yes   No   Don't Know
  
5. Does your current estate plan give instructions for your care and the care of your loved ones in the event of disability? Yes   No   Don't Know
  
6. Are you certain that your current estate plan will minimize possible federal estate taxes at your death, including taxes on your house, life insurance and IRAs? Yes   No   Don't Know
  
7. If you have a Revocable Living Trust in place, is your trust fully funded so that your family can avoid the delay and expense of probate? Yes   No   Don't Know
  
8. Have you taken steps to avoid possible will contests and disputes during the administration of your estate? Yes   No   Don't Know

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|--|-----|----|------------|
| 9. Does your estate plan protect your children's inheritance in the event your surviving spouse chooses to remarry?  | Yes | No | Don't Know |
| 10. Have you recently checked the beneficiary designations of your retirement plans and life insurance policies and are you confident that you have not listed your estate or any minor children as either primary or secondary beneficiaries? | Yes | No | Don't Know |
| 11. Does your current estate plan provide creditor and lawsuit protection for assets passed to your surviving spouse or to your children's inheritance?  | Yes | No | Don't Know |
| 12. Are you confident that your current estate plan is income tax efficient?   | Yes | No | Don't Know |
| 13. Does your current plan protect your children's inheritance from a divorcing spouse?  | Yes | No | Don't Know |
| 14. Are you satisfied with the person(s) you named as guardians of your minor children in your current plan?   | Yes | No | Don't Know |
| 15. Are you satisfied with the persons selected as executor, trustee, power of attorney, and successors in your current plan?  | Yes | No | Don't Know |

If you answered **No** or **Don't Know** to any of these questions, you can sign up for a no cost, no obligation estate planning consultation. Please call 816-249-2122 or contact me at [jane@jlawfirm.com](mailto:jane@jlawfirm.com) to schedule your complimentary consultation. If you were provided this questionnaire by your financial advisor, please contact him or her to schedule your collaborative complimentary consultation.