

Do I Need A Will or Trust?

TAKE A FEW SECONDS TO FIND OUT

1. HOME

Rent (0 pts)

Own property with less than \$50,000 in equity (2 pts)

Own property with more than \$50,000 in equity (5 pts)

2. CHILDREN

None (0 pts)

Minor Child(ren) (5 pts each)

Healthy Adult Children (3 pts each)

Disabled Child(ren) (5 pts each)

3. VALUABLES – If you added up everything you own including clothes, electronics, cars, boats, jewelry, collectibles, and everything else except real estate roughly how much would it be worth?

Less than \$25,000 (0 pts)

\$25,000 - \$50,000 (4 pts)

More than \$50,000 (5 pts)

4. MULTI-STATE – Do you own property in more than one state?

No (0 pts)

Yes (5 pts each state)

5. PRIVACY – Do you care if lists of all your belongings are made public and details are made available Online?

No (0 pts)

Yes, I like my privacy (4 pts)

6. INCAPACITATION – If you are incapacitated, do you want to decide who manages your personal affairs, healthcare & assets?

No, my spouse or court appointee is ok (0 pts)

Yes, I would like to select someone myself (5 pts)

TOTAL SCORE

“EITHER YOU HAVE A PLAN, OR THE GOVERNMENT HAS ONE FOR YOU”

Did you know everyone has an estate plan? Unfortunately, most people find this out too late! If you have no plan, the State dictates what happens to you and your belongings in open and very public court!

Most Americans are unsettled by the thought of leaving very personal decisions up to courts, bureaucrats, and laws passed by politicians, not to mention the cost and loss of privacy.

Most know they need something, but what kind of plan? A Last Will and Testament? A Revocable Living Trust? A Living Will, and Advanced Directives? All of these? Or something else? Its' easy to get overwhelmed, confused, and just never make a plan... until now.

HOW DID YOU SCORE?

- 0 You are probably fine without an estate plan. However, make sure you have “payable on death” notations on all your bank accounts, and a power of attorney if you are unmarried.
- 1-5 You should have at least a Last Will & Testament, and should consider a Living Will & Testament, and should consider a Living will with Advanced Directives document, too.
- 5+ You would benefit from a comprehensive Revocable Living Trust, Last Will & Testament, Powers of Attorney, and Living Will with Advanced Directives

WHAT NOW?

Talk to the professional listed below. They can help you find a solution that will fit your needs.

You may be surprised how easy and inexpensive the options are today.

Estate planning is not just for “the rich” anymore. Technology is helping the average people take control of their plan, for a fraction of the time and cost.



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