HOW PREPARED ARE YOU?

Roberson Law
A Legal Professional Association

Please answer the following questions by checking the appropriate column.

	Yes	No
1. Do you have a current will signed after January 1982?		
2. Does your will state your current preference for the guardian and alternate guardian of your minor or incompetent children and waive bond for these persons?		
3. Does your will state your current preference for the executor and alternate executor of your estate and waive bond for these persons?		
4. Do you have a general durable power of attorney that you signed within the last five years and does it name alternate agents?		
5. Do you have a health care power of attorney and a living will?		
6. Do you have a licensed financial advisor, lawyer, insurance agent, and accountant?		
7. Do you have life insurance in the amount of ten times your annual income?		
8. Do you have the following kinds of insurance: Umbrella liability insurance?		
Long term care insurance?		
9. Do you have written funeral and burial preferences, and have you discussed them with the people who will be in charge of them?		
10. If you have an expensive hobby (coins, antiques, guns), could your survivors locate important information about it?		
11. If you have a business, could your survivors locate financial and operational information about it?		
12. If you have any pets, have you made arrangements for their care when you die?		
13. Are your children capable of managing large sums of money after your death?		
14. If there are any assets that you do not want sold after your death, is that information written in your will?		
15. Do you know how to set up and live on a budget?		
16. Are there current beneficiary designations on all of your payable-on-death assets (life insurance, annuities, pension and retirement plans, POD bank accounts, IRA's)?		
17. Do you store your important papers in a fire-resistant safe or container or safe deposit box?		
18. Could your survivors locate your assets and important papers, including:		
Bank accounts		
Safe deposit boxes and their keys		
Real estate papers, including deeds and mortgages		
Wills, trusts, and powers of attorney (originals, not photocopies)		
Life insurance policies		
Birth certificates of all immediate family members		
Death certificates of all immediate family members		
Marriage certificates		
Divorce and child custody papers		
Military discharge papers		
Titles to cars and other motor vehicles		
Tax returns		
Canceled checks		
Stocks, bonds, contracts, and notes		
Annuities, death benefits, and retirement plans		
Social security numbers of all immediate family members		
List of persons to notify when you die		

19. In which area do you feel most unprepared in the event of your death? _____

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