



## Estate Planning Quiz

Please answer “yes” or “no” to the following questions.

- \_\_\_\_\_ 1. Do you have any children under the age of 18?
- \_\_\_\_\_ 2. Have you had a previous marriage?
- \_\_\_\_\_ 3. Do you have any support obligations for an ex-spouse or children?
- \_\_\_\_\_ 4. Do you own property in more than one state?
- \_\_\_\_\_ 5. Do you want to treat your children differently in your estate plan?
- \_\_\_\_\_ 6. Do you want to avoid court intervention in your estate at your death?
- \_\_\_\_\_ 7. Do you want to limit the taxes, expenses and time delays on your estate at your death?
- \_\_\_\_\_ 8. Do you, your spouse or a child have a disability?
- \_\_\_\_\_ 9. Would you like your financial affairs to be kept private at your death?
- \_\_\_\_\_ 10. Do you anticipate that your estate with retirement plans, real estate, investments and insurance will be one day worth more than \$1,000,000?
- \_\_\_\_\_ 11. Are you or your spouse a citizen of a country other than the United States?
- \_\_\_\_\_ 12. Would any of your heirs disagree with the way that you would like to have your estate distributed?
- \_\_\_\_\_ 13. Would you like to protect your estate so that it cannot be carelessly spent and so that people cannot take advantage of your heirs?

*If you answered “yes” to any of the questions above, then you need to have a trust as a part of your estate plan. If you answered “yes” to any of the questions other than number 1, then you will need a living trust as part of your estate plan.*