

Q&A Worksheet

So now you know...Where do you go next?

- 1.** If you have a will, what changes do you expect to make? If not, has this presentation convinced you to get one? Why or why not? What wishes do you want specified in your will?

- 2.** Life insurance provides tax-free cash right away to settle estates. Do you plan to buy more life insurance or increase what you have?

- 3.** List all your accounts? What are their beneficiary designations? How are they titled? When was the last time you reviewed them? What changes might you make?

- 4.** Have you appointed a guardian for your children? Does this person know of your wishes? If you have not selected a guardian, whom would you wish to take this responsibility? What steps will you take to officially designate a guardian?

- 5.** Have you appointed someone to make medical and/or health care decisions for you if you are incapacitated? If not, do you now plan to do so? Who will you appoint? What stipulations do you wish to make?

Name _____

Date _____