



estate planning review

brought to you by Ross Estate Planning
 rossestateplanning.com

Candidly answer the following questions about your estate plan. Answers of “no,” “not sure,” or “n/a” may require the attention of a qualified estate planning attorney. If you are interested in learning about the services offered by Ross Estate Planning, please complete the contact information form following this questionnaire, and return it to Ross Estate Planning at the address listed on page two. Alternatively, you may complete and submit this questionnaire on-line at rossestateplanning.com/review.pdf.

	yes	not sure	no	n/a
1. Have you prepared a will or trust?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Will your affairs remain private after your death or instead become part of the public probate record?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does your estate plan minimize estate and gift taxes for your family to the greatest extent permitted by law?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does your estate plan protect your wealth from creditors and failed marriages?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Have you done everything practicable to avoid contests and disputes concerning your estate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Have you prepared a power of attorney which allows your loved ones to make healthcare decisions if you are unable to make these decisions for yourself?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Are assets like bank accounts, brokerage accounts, and real estate titled in the name of your living trust?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does your estate plan protect you from going to a nursing home against your will?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	yes	not sure	no	n/a
9. Do you have legally enforceable guidance about who will care for your minor children should you die or become severely disabled?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does your estate plan lessen the chances of your children squandering or harming themselves with the wealth they will inherit upon your death?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Are your healthcare planning documents accessible by any hospital at any time?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Has your estate plan been reviewed by an attorney since 2005?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

TODAY'S DATE _____

NAME _____

ADDRESS _____

TELEPHONE () home work cellular

BEST TIME TO CALL YOU _____ AM PM

E-MAIL _____

Please return to:

Ross Estate Planning PO Box 317 Sturgeon Bay WI 54235

Ross Estate Planning serves its clients exclusively in the areas of estate planning, trust administration, and probate. To schedule an appointment with us, please call (920) 743-9117 or toll free (866) 743-9117.