

# IS IT TIME FOR A REVIEW?



Does your will or trust still meet your goals? Is it time for a review? How often should you review your planning? This quiz will help you determine if you are in the green and good to go or if you are in the red and it is time to ensure you have the right planning in place to protect you and your loved ones in the event of a death or disability. Bring this completed quiz to your initial meeting & receive **\$100 off** of your planning fees. Call us to schedule at 605-777-1772 or email [info@HarrisLawTrust.com](mailto:info@HarrisLawTrust.com).

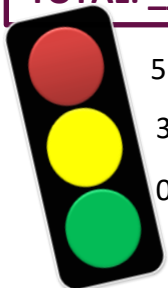
## READY...SET...GO

YES NO ?

0	5	5	Do you have a will or a trust that confidently meets your goals in a protected, tax efficient manner?
1	0	1	Do you have any more children or grandchildren since you created your plan?
2	0	1	Have you or any of your children been divorced since you created your plan?
1	0	1	Has your net worth increased or decreased since you created your plan?
2	0	1	Do you have new property since you created your plan?
0	2	1	Are your goals for the distribution of your estate the same?
1	0	1	Do you want to provide for your children's or grandchildren's education?
0	2	1	Do you actually understand your plan?
0	1	1	Do you know if (and how) your plan protects you and your family from a disability?
0	1	1	Do you know the steps your loved ones need to take when you pass away?
0	1	1	Does your plan include income tax planning to help you avoid or minimize capital gains taxes?
0	1	1	Are the tax codes your plan relies upon still the same?
0	1	1	Is the law your plan relies upon still the same?
0	1	1	Does your plan protect your children in the event they get divorced? Or have creditor problems?
1	0	1	Do you have new/different accounts (CDs, stocks, bonds, checking) since creating your plan?
0	5	3	Is your plan "funded"? Did your attorney explain the importance of funding & give specific instructions for each individual asset you own?
0	5	3	Did you complete the funding process for your will or trust?
0	1	1	Does your plan protect your children in the event your spouse remarries after you pass away?
3	0	2	Is your net worth \$3 million dollars or more (value of everything you own including life insurance)?
2	0	2	Has it been over 3 three years since you reviewed or created your plan?

TOTAL: \_\_\_\_\_

## WHAT IS YOUR SCORE?



5 or More – **STOP**. Your plan may be in CRITICAL condition. Schedule a meeting today.

3 to 5 – **CAUTION**. Your plan requires attention. Schedule a review in the next 6 months.

0 to 3 – **GO**. Your plan is in good to go. Schedule a review within the next 2-3 years.



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