


MINDSET QUIZ

MINDSET	1 POINTS	2 POINTS	3 POINTS	5 POINTS	YOUR SCORE
1 CLEAR COMMUNICATION Are you comfortable sharing your goals and concerns with us?	Sharing goals, concerns, financial information and family background with my legal team is not necessary.	I'm reluctant to share info about my goals, concerns, financials and family, but will give my team minimal information.	I'd consider sharing goals, concerns, financials, and family info so my team can work with minimal effort.	I'm 100% ready to share any information to help my legal team do their jobs and trust them to protect my info.	
2 OUR RELATIONSHIP What kind of relationship do you expect to share with your legal team?	My estate plan is a simple transaction, and I will not need to revisit it for another 10 to 15 years.	My estate plan should be reviewed and revised every few years, but any attorney will do.	My estate plan should be revisited frequently and would value an ongoing relationship with my legal team.	My legal team is the key to keeping my financials, taxes, and legal needs current in a quickly changing world.	
3 RECEPTIVITY How receptive are you to your attorney's plans and ideas?	I know what I want from my estate plan and an online document service can prepare them as good as an attorney.	A good lawyer probably has helpful ideas for others, but they won't apply to my needs.	My lawyer will likely add value to my estate plan, but that is for the benefit of my children – not me and my spouse.	I value my lawyer's expertise and am very receptive to their creative solutions to protect my financial well-being.	
4 WILLING TO RESPOND How willing are you to respond to requests from your legal team?	My legal team only asks me to disclose my assets and financial information so they can charge me more.	I can decide for myself what information my legal team needs and will only give them what I feel is necessary.	My legal team knows what information is necessary, I'll give it to them when I have the time.	I respond to my legal team's requests for information and feedback as soon as I possibly can.	
5 APPRECIATION Is estate planning a simple task or a crucial process to you?	Estate planning is a simple process and does not require much thought or strategy.	I'm willing to answer quick questions, but I find all the steps and meetings rather annoying.	I understand that proper estate planning is a thorough process with careful considering. I've just never experienced this.	I appreciate the flow of the process and the time spent planning, designing, implementing and maintaining my plan.	
6 TEAMWORK How high do you value working with a competent legal team?	I'm paying my attorney. He should be the one answering my questions, not his team.	I'll work with my attorney's team if I absolutely have to, but I prefer to work with my attorney directly.	I'm willing to work with my attorney's team, but I need validation from him that they are doing a good job.	The whole team is well-educated, trained and trustworthy. Their help in drafting and funding makes the process efficient.	
7 EXPERT VALUE Do you see all attorneys as equal? Or having specialized skill sets?	Most attorneys are good at their jobs and that makes them interchangeable.	Some attorneys are experts in certain areas, but I don't need an expert for my situation.	I want a well-qualified attorney, but I don't necessarily know how to identify who the experts are.	I want a very well-experienced and specialized legal team who will provide me clarity, ease, and confidence in my planning.	
8 SETTING EXPECTATIONS What do you see as reasonable turnaround times and fees?	My work should be complete before I ask for it, it should be perfect, and it should be done at minimal cost to me.	My situation is simple and should not take much effort. Fees for this should be at the lower end of the spectrum.	I believe that the amount of time put into my plan is reflected in the quality of work and fees align with this.	I have high expectations for the work quality of my estate planning. My plan is important and I feel its value will exceed its price.	
SCORECARD					YOUR TOTAL SCORE