



LEGACY

LAW GROUP, PLLC

Estate Planning Warm Up

The Estate Planning process involves a lot of significant decisions, and sometimes it can feel difficult or overwhelming to know even where to begin. This “Warm Up” can serve as an easy exercise for some self-reflection to help get your mind thinking about the big picture of your estate, your family, your wishes and the important considerations you will want to address with your planning.

If something were to happen to you tomorrow and you either became incapacitated or passed away unexpectedly— *would you feel at peace* knowing you had a well-designed plan in place for the following considerations?

	YES	NO
Am I leaving my assets where I want them to go?	<input type="checkbox"/>	<input type="checkbox"/>
Will the courts be involved in my estate at disability?	<input type="checkbox"/>	<input type="checkbox"/>
At death?	<input type="checkbox"/>	<input type="checkbox"/>
Is my plan set up to encourage family harmony?	<input type="checkbox"/>	<input type="checkbox"/>
Am I protecting my spouse at death?	<input type="checkbox"/>	<input type="checkbox"/>
Are my kids protected if my spouse remarries?	<input type="checkbox"/>	<input type="checkbox"/>
Are my children’s inheritance protected from divorces, creditors, lawsuits, and bankruptcy?	<input type="checkbox"/>	<input type="checkbox"/>
If both my spouse and I die, do I know legally who will be taking care of my children?	<input type="checkbox"/>	<input type="checkbox"/>
Does my family know my wishes for my medical well-being?	<input type="checkbox"/>	<input type="checkbox"/>
Do I know who has legal ability to make medical decisions on my behalf if I am incapacitated?	<input type="checkbox"/>	<input type="checkbox"/>
Does my family know how I would like my remains handled after my death?	<input type="checkbox"/>	<input type="checkbox"/>

If you've answered "NO" to any of the above questions - it's time to consider setting up your estate plan. Estate planning at its core is *NOT* about the documents - its about having a well thought out *PLAN*! [Click here](#) to schedule your Discovery Call with Legacy Law Group. We will work together to custom craft a plan by focusing on your overall goals and concerns to help you find your peace of mind.