



10 Point Checklist

When Something Happens, Are You Prepared?

- 1) Do you and your family members have current Advance Health Care Directives (aka Living Wills)?
Yes No Don't Know
- 2) Do you and your family members have current Health Care Power of Attorneys?
Yes No Don't Know
- 3) Do you and your family members have current Financial Power of Attorneys?
Yes No Don't Know
- 4) Do you and your family members have written instructions on how to handle your assets when something happens?
Yes No Don't Know
- 5) Have you and your family discussed what do to when someone needs long-term care?
Yes No Don't Know
- 6) Have you and your family discussed how you will pay \$5000+ a month for long-term care?
Yes No Don't know
- 7) Have you and your family discussed who will make decisions for you when you are no longer able?
Yes No Don't know
- 8) Is there anyone in your family who is disabled and may need special needs planning?
Yes No Don't know
- 9) Have you told your family members how to find your important documents?
Yes No Don't Know
- 10) Do you have a list of family, business contacts, and user names and passwords, that your family members will need when something happens?
Yes No Don't Know

Answering 'No' or 'Don't Know' to even one of these questions puts people at risk. Don't be that person. Make sure your family knows how to access vital information in case you cannot tell them. Plan now so you do not risk being financially, as well as emotionally, wiped out if the worst happens.

Contact us today, mention this checklist and receive a free consultation.

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