

ARE YOU PREPARED?

Take this 60 second quiz

- | | | Yes | No |
|----|---|--------------------------|--------------------------|
| 1. | I have named a Guardian for my minor (under age 18) children to avoid costly, and potentially contentious, guardianship court proceedings. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. | I have a Health Care Proxy to permit my spouse, child, or other family member to make health care decisions for me in the event I am unable to make my own health care decisions. | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. | I have a HIPAA (Health Information Portability & Accountability Act) Release to permit the person named in number 2, above, to have access to my protected health information in the event he/she needs to make health care decisions for me. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. | I have a Living Will that informs my designated Health Care Proxy what my end of life wishes are (even though not legally binding in Massachusetts). | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. | I have a Durable Power of Attorney authorizing my spouse, child, or other trusted person to make financial decisions for me in the event I am unable to do so, whether I be incapacitated or otherwise unavailable. | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. | I have executed a <u>valid</u> Last Will & Testament so that I know exactly who will receive any real and personal property that I own, and who will administer my estate when I pass. | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. | I have taken steps to protect my children's inheritance in the event my surviving spouse has other children or chooses to remarry after my death. | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. | I have left a list of my assets, to include bank accounts, life Insurance policies, IRAs, 401(k)s, 403(b)s, stock and mutual funds, real estate and businesses that I own or have ownership rights in, digital assets/passwords, and this list includes where these assets are located and who the beneficiaries are. | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. | I have a sizeable (i.e., taxable) estate and I am confident that my current estate plan takes advantage of Federal and Massachusetts Estate Tax Exemptions. | <input type="checkbox"/> | <input type="checkbox"/> |