**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.

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.

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.

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).

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.

6. I have executed a valid 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.

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.

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.

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.