

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"/>