



C U N N I N G H A M L E G A L

ESTATE PLANNING | TRUST | PROBATE LAW

Estate Planning Quiz

Many individuals are unsure as to whether or not they need to do any estate planning. Below is a simple set of ten questions to help determine whether you, or a loved one, are in need of an estate planning review. Simply circle the answer which best explains your situation.

1. Do you have a Will or Trust? (Yes/No/I don't know)
2. Do you have a Power of Attorney for Financial Matters? (Yes/No/I don't know)
3. Do you have a Power of Attorney for Healthcare Decisions? (Yes/No/I don't know)
4. Do you have a Living Will? (Yes/No/I don't know)
5. Have your estate planning documents (Wills, Trusts, Powers of Attorney been prepared or reviewed in the last five years? (Yes/No/I don't know)
6. Are all of the beneficiaries of your estate over 18 years old? (Those you want to inherit from you when you die)? (Yes/No/I don't know)
7. Are all of the beneficiaries of your estate without disabilities? (Not receiving any type of government assistance.) (Yes/No/I don't know)
8. Are your heirs financially responsible? (Yes/No/I don't know)
9. Do you want your estate to go to probate court after your death? (Yes/No/I don't know)
10. Have you done any type of planning for long-term care? (Yes/No/I don't know)

If you answered “I don't know” or “no” to one or more questions, you should consider scheduling a FREE estate planning consultation.