

How Did You Do?

It's time to calculate your score. If the values of your *False* answers total:

0-12 points: You are unusually prudent in financial affairs. Congratulations!

13-25 points: You are above average in estate planning. Now would be a good time to review your plans and update them as needed.

26-34 points: You should take time to reconsider your current estate plan. An advisor can help ensure your wishes are met.

Over 35 points: Your loved ones will likely experience significant difficulties, delays and expenses in settling your estate.

Learn More

We hope you found this quiz helpful in identifying areas of your estate plan that need attention. Contact us if you would like to receive more information as you consider the charitable aspect of your plans.



An Estate Planning Quiz FOR WOMEN

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Estate planning is critical to ensuring and protecting your financial future and that of your loved ones. Whether you are married, were never married, were previously married or have been widowed, it is important to have your own plans in place for asset management and other financial concerns.

Having a properly drafted will or living trust as well as up-to-date related documents is the best way you can protect your assets, take care of your heirs and ensure your property is distributed as you wish whether to family, friends or charity.

Take the Quiz

Do your current plans still reflect your wishes? Answer *True* or *False* to the following statements to find out.

True False

- 1. I have a will and/or living trust. (10 points)
- 2. I have not moved to a different state since the last time I reviewed my estate plans. (2 points)

True False

- 3. My marital status has not changed since my last review. (8 points)
- 4. No loved ones, such as nieces, nephews and grandchildren, have been born since my plans were last reviewed. (5 points)
- 5. I am certain my property (and financial assets) will go to those I wish in the amounts I desire. (5 points)
- 6. My family members will not need assistance managing inherited assets. (4 points)
- 7. No significant increases or decreases in wealth (asset values) have occurred since my last review. (4 points)
- 8. I have made adequate provisions for the care of my pets after my lifetime. (6 points)
- 9. I am satisfied with the charitable gifts included in my plans. (4 points)

True False

- 10. I have provided explicit written authority to access my digital accounts, records and assets. (3 points)
- 11. I know my will may not determine the beneficiaries of my life insurance policies and retirement plan accounts. (3 points)
- 12. My chosen executor is still willing and able to serve, and I have named an alternate. (2 points)
- 13. My assets are jointly owned where appropriate. (4 points)
- 14. My financial records are up to date and readily accessible. (3 points)
- 15. I have discussed my estate plans with those close to me. (3 points)