

Are Your Affairs in Order?

by Maurice Offit, Esq.

There's only one way to know
Take the quiz set forth below!



Estate Planning Quiz

1. Do you have a Will?
 - a. Yes
 - b. No
2. Do you know what your Will indicates?
 - a. Yes
 - b. No
3. Do you know where the original of your Will is kept?
 - a. Yes
 - b. No
4. Was your Will signed within the last five years?
 - a. Yes
 - b. No
5. Do you have a general power of attorney and a medical care power of attorney?
 - a. Yes
 - b. No
6. If the answer to question 5 is "yes," do you know who you designated in your powers of attorney to make financial and medical decisions for you?
 - a. Yes
 - b. No
7. Do you have an advance medical directive?
 - a. Yes
 - b. No
8. Do you know who the primary beneficiary is of your life insurance policies and retirement plan accounts?
 - a. Yes
 - b. No
9. Did you name a secondary beneficiary of your life insurance policies and retirement plan accounts (in case the primary beneficiary fails to survive you)?
 - a. Yes
 - b. No
10. Do you know if any estate or inheritance taxes will be due as a result of your death?
 - a. Yes
 - b. No

For each question that you answered "yes," give yourself a point. If you got at least nine points, give yourself a pat on the back.

If you got less than nine points, take the time to review your estate planning documents and make sure that they're in order. If they're not, please contact me and we'll send you an estate planning questionnaire for you to complete and return to us.

CONTACT

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