

## Check any of the following items that concern you:

- \_\_\_\_\_ What will happen to my property or assets when I die if I do not have a Will or a Trust that spells this out? Will the State determine who receives my assets?
- \_\_\_\_\_ If I become incapacitated - through stroke, alzheimers, or accident - will my spouse be able to sell our home, access my retirement accounts, or deal with accounts that are just in my name?
- \_\_\_\_\_ What will happen to my spouse if he or she is incapacitated when I die or becomes incapacitated after I die?
- \_\_\_\_\_ Can my spouse change his or her Will after I die? What if there is a second marriage?
- \_\_\_\_\_ How can I avoid a public inventory of my assets being filed at the courthouse after I die? Or my nosy neighbors finding out who inherited my property?
- \_\_\_\_\_ How long will it take my loved ones to find out what assets I owned, or the paperwork regarding them? What if my papers are, well, a mess?
- \_\_\_\_\_ I don't have a list of all my passwords for my accounts and computer programs - or I haven't told my loved ones what they are. Will that be a problem?
- \_\_\_\_\_ What happens to my child's inheritance if he or she gets divorced?
- \_\_\_\_\_ How can I avoid a court guardianship or conservatorship? What happens the assets we own jointly if my spouse needs a court guardianship or conservatorship?
- \_\_\_\_\_ What assets can I keep if my spouse needs nursing home care and we can't afford to pay?
- \_\_\_\_\_ Will my disabled child or grandchild be denied government assistance if I leave them an inheritance?
- \_\_\_\_\_ When I die, I would like some of my stories, values and life lessons preserved, so that my loved ones can better remember me after I die. Tell me about how I can preserve my legacy.

For an appointment to discuss any of the above, contact:

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