

DO I NEED A WILL OR TRUST?

TAKE A FEW SECONDS TO FIND OUT

HOME

1

- Rent (0 pts)
- Own property with less than \$50,000 in equity (2 pts)
- Own property with more than \$50,000 in equity (5 pts)

CHILDREN

2

- None (0 pts)
- Minor Child(ren) (5 pts each)
- Healthy Adult Children (3 pts each)
- Disabled Child(ren) (5 pts each)

VALUABLES

3

If you added up everything you own including clothes, electronics, cars, boats, jewelry, collectibles and everything else except real estate roughly how much would it be worth?

- Less than \$25,000 (0 pts)
- \$25,000- \$50,000 (4 pts)
- More than \$50,000 (5 pts)

MULTI-STATE

4

Do you own property in more than one state?

- No (0 pts)
- Yes (5 pts each state)

PRIVACY

5

Do you care if lists of all your belonging are become public and details made available online?

- No (0 pts)
- Yes, I like my privacy (4 pts)

INCAPACITATION

6

If you are incapacitated, do you want to decide who manages your personal affairs, healthcare & assets?

- No, my spouse or court appointee is ok (0 pts)
- Yes, I would like to select someone myself (5 pts)

TOTAL SCORE

TURN OVER
FOR RESULTS



CLARK FINANCIAL PARTNERS
Your Retirement Planning Partner

“EITHER YOU HAVE A PLAN, OR THE GOVERNMENT HAS ONE FOR YOU!”

Did you know everyone has an estate plan? Unfortunately most people find this out too late! If you have no plan the State dictates what happens to you and your belongings in open and very public court!

Most Americans are unsettled by the thought of leaving very personal decisions up to courts, bureaucrats, and laws passed by politicians, not to mention the cost and loss of privacy.

Most know they need something, but what kind of plan? A Last Will and Testament? A Revocable Living Trust? A Living Will, and Advance Directives? All of these? Or something else? Its' easy to get overwhelmed, confused, and just never make a plan... until now.

HOW DID YOU SCORE?

0

You are probably fine with the without an estate plan. However make sure you have “payable on death” notations on all your bank accounts, and a power of attorney if you are unmarried.

1-5

You should have at least a Last Will & Testament, and should consider a Living Will with Advance Directives document too.

5+

You would benefit from a comprehensive estate plan. Your plan should include a Revocable Living Trust, Last Will & Testament, Powers of Attorney, and Living Will with Advance Directives.

WHAT NOW?

Talk to the professional listed below. They can help you find a solution that will fit your needs.

You may be surprised how easy and inexpensive the options are today.

Estate planning is not just for “the rich” anymore. Technology is helping average people take control of their plan, for a fraction of the time and cost.



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