

Estate Readiness Quiz

Names: _____
Date: _____
Phone: _____

Where do you stand in your estate plans? Take this 3 minute quiz to discover how things look and what areas you could improve in. You can score yourself as well.

Feel free to speak with Doug about your results and the next steps.

902-404-8410 or doug@wiltshirefinancial.ca

1. Holistic planning includes both financial and non-financial factors. Have you reviewed these factors in the last three years?
 - a. Not once (0)
 - b. Around one time (2)
 - c. More than one time (3)
2. Had a professional estate plan prepared in the last 5 years?
Yes 3 () 0 No ()
3. Completed personal net worth statement and a personal records document in the last three years?
Yes 3 () 0 No ()
4. Do you feel financially prepared for a serious illness or long term care needs:
Yes 3 () Somewhat 1 () No 0 ()
5. Do you feel financially prepared for death: Yes 3 () Somewhat 1 () No 0 ()
6. Do you have an updated will with an appropriate executor?
Yes 3 () 0 No ()
7. Do you have an enduring power of attorney?
Yes 3 () 0 No ()
8. Are tax inefficiencies being addressed?
Yes 3 () 0 No ()
9. Completed a personal records inventory in last two years?
Yes 3 () 0 No ()

10. Have you had a conversation with your executor summarizing important points about your estate and location of important records?

Yes 3 () 0 No ()

11. Are your plans up to date with previous spouses and children?

Yes 3 () 0 No ()

12. Have you had conversations with an estate specialist and your executor about finances and your plans?

Yes 3 () 0 No ()

13. Have you addressed long-term, end of life care and funeral plans?

Yes 3 () 0 No ()

_____(39 pts max, Questions 1 - 13)

If you are a **business owner**, do you have an updated written and witnessed succession plan?

Yes () No ()

Total Points: _____ (max 39 pts)

0 - 15 Points Improvement Needed: Now that you know where you stand, with guidance you can begin to reach for estate planning milestones and prepare for unexpected events. Speak with Doug about how to get started.

16 – 25 points Moderately Ready: You are more ready in some areas of your estate plans than others. Speak with Doug to learn how to strengthen your weak spots & boost your confidence to handle everything life has in store, whether planned or unexpected.

26 - 39 points Financial Readiness You are doing well. Though you probably knew you were in good shape- it always helps to see the different areas where you are prepared & know that your confidence is well placed. To see if you could be doing even better, speak with Doug.