

## PERSONAL LEGAL WELLNESS CHECK-UP

Like a legal thermometer, this check-up helps you assess your current legal health to prevent or minimize legal troubles in your life. Print out your completed check-up and if you have questions or concerns, please contact us to find out how we can help you.

### LEGAL CHECK-UP QUESTIONS

- |   | Yes                      | No                       |
|---|--------------------------|--------------------------|
| 1. Do you have a will which has been revised within the past 3 years?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. If yes, have you provided for your pet(s)?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Have you discussed your estate planning with anybody?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Is your contract of employment or partnership agreement both current and adequate for your current needs?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Are you adequately covered by policies of life, vehicle, liability (both personal and professional), disability, umbrella, and other insurance?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Do you have any financial or liability exposures which are insurable but presently uninsured (e.g. disability insurance)?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Are there any potential claims which could be asserted against you?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Have any claims been asserted against you?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 9. Have you within the past 5 years checked whether the Social Security Administration has properly accounted for your future benefits?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Do you have a file, stored in a secure and fireproof location, containing all important documents (wills, securities, contracts, marriage/divorce papers, deeds, pension/profit sharing plans, etc.)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Have you within the past 3 years reviewed the beneficiary designation on all documents which requires such information?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 12. Do you have a complete and current personal financial statement which lists in detail all of your personal assets and liabilities?  | <input type="checkbox"/> | <input type="checkbox"/> |
| 13. Do you have a complete and current inventory of all of your physical possessions, sufficient to support a claim in the event of a loss?   | <input type="checkbox"/> | <input type="checkbox"/> |
| 14. To the extent the foregoing questions are relevant to your spouse (if any) and minor children (if any) are there any matters or issues which should be updated, reconsidered or changed?              | <input type="checkbox"/> | <input type="checkbox"/> |

- 15. To the extent there are persons other than spouse or children for whom you may have some responsibilities (e.g. aging parents) are there items or issues which should be updated or changed?
- 16. Do you have unpaid tax liabilities?
- 17. Are you planning to file for divorce?
- 18. Do you know of any other situations in your life that might cause legal exposure?
- 19. Have any of these questions caused you to consider taking some action or making some further review?