

Do I Need a Will or a 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 belongings become public and details made available on line?

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

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



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ESTATE PLANNING

How Did You Score?

0

You are probably fine 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.

“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? It's easy to get overwhelmed, confused, and just never make a plan... but the people you love deserve a plan.

Your Family Peace of Mind Plan

Estate planning isn't just for the wealthy—it's for anyone who loves their family enough to plan ahead. Plus technology has made it more cost effective than you may realize. You don't have to do it alone. We'll help you take the next step with clarity, confidence, and the peace of knowing your children and legacy are protected.

For more info and to register for upcoming webinars visit us at:
LiveMementoMori.com

Live Memento Mori
Because every moment matters.