THE TIM BARKLEY LAW OFFICES

ESTATE PLANNING QUESTIONNAIRE

If you check "no" to any of the questions below, we should meet to review your needs and goals, and to ensure your future security.

	Yes	No	N/A
1. Do you have a will?			
2. Is your will more recent than 1985?			
3. Are your children and spouse free of physical and mental handicaps?			
4. Are your children all over the age of eighteen?			
5. Is your current spouse your first spouse, and are you the first spouse of your current spouse?			
6. Are both your family and your spouse's family free of a history of debilitating illness?			
7. Do you and your spouse understand your current estate plan?			
8. Are you reasonably able to spend $3,000.00 per month on long-term medical care for thirty months or longer?			
9. Have you reviewed your net worth within the past twelve months?			
10. Are both you and your spouse comfortable with management of family assets?			
11. Are both you and your spouse comfortable with tax preparation and tax planning?			
12. Do you and your spouse know how much life insurance each has and its cash value, and who owns the policies?			
13. Do both you and your spouse know who to contact and how to select options on the payment of life insurance proceeds?			
14. Are both you and your spouse comfortable with your current level of insurance?			
15. Do you each feel you could live on the other's insurance for twenty years, if added to your other assets?			
16. Do you and your spouse have a current financial power of attorney?			
17. Do you and your spouse know what medical care the other wishes to receive in the event of incompetency?			
18. Do your medical powers of attorney or living wills reflect your current wishes?			
19. In the past twelve months, have you and your spouse reviewed your current financial situation in light of your long-term goals?			
20. Will your current financial strategy help you attain your long-term financial goals?			

Tim Barkley
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