

## ASSET PROTECTION ASSESSMENT

**1. Estate Plan Update:**

Date of Last Family Estate Plan Update: \_\_\_\_\_

**2. Identifying Your Assets:**

*Real Estate:*

- |  |   |  |
|--|---|--|
| <input type="checkbox"/> Primary Residence | <input type="checkbox"/> Vacation Homes | <input type="checkbox"/> Vacant Land   |
| <input type="checkbox"/> Rental Properties | <input type="checkbox"/> Land Overseas  | <input type="checkbox"/> Other (_____) |

*Financial Assets:*

- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Bank Accounts | <input type="checkbox"/> IRA (Traditional) | <input type="checkbox"/> Pension Plan   |
| <input type="checkbox"/> Investments   | <input type="checkbox"/> Roth IRA          | <input type="checkbox"/> Cryptocurrency |
| <input type="checkbox"/> Stocks, Bonds | <input type="checkbox"/> 401(k) or 403(b)  | <input type="checkbox"/> Other (_____)  |

*Business Interests:*

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> Sole Proprietorship | <input type="checkbox"/> C Corporation | <input type="checkbox"/> Limited Liability Company |
| <input type="checkbox"/> Partnership         | <input type="checkbox"/> S Corporation | <input type="checkbox"/> Other (_____)             |

*Personal Property:*

- |                                       |                                  |  |
|---------------------------------------|----------------------------------|--|
| <input type="checkbox"/> Vehicles     | <input type="checkbox"/> Artwork | <input type="checkbox"/> Other (_____) |
| <input type="checkbox"/> Collectibles | <input type="checkbox"/> Jewelry | <input type="checkbox"/> Other (_____) |

**3. Potential Risks:**

Rate your level of concern for the following risks on a scale of 1 to 5  
(1 = Not Concerned, 5 = Very Concerned):

- \_\_\_\_ Lawsuits and Legal Claims  
 \_\_\_\_ Creditor Claims  
 \_\_\_\_ Divorce Proceedings  
 \_\_\_\_ Long-Term Care Expenses  
 \_\_\_\_ Identity Theft  
 \_\_\_\_ Cybersecurity Risks  
 \_\_\_\_ Other (\_\_\_\_\_)

**4. Insurance Coverage:**

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Homeowners Insurance | <input type="checkbox"/> Liability Insurance  | <input type="checkbox"/> Long-Term Care Insurance |
| <input type="checkbox"/> Auto Insurance       | <input type="checkbox"/> Health Insurance     | <input type="checkbox"/> Life Insurance           |
| <input type="checkbox"/> Umbrella Insurance   | <input type="checkbox"/> Disability Insurance | <input type="checkbox"/> Other (_____)            |

**5. Estate Planning Tools:**

Check the estate planning tools you have in place or are interested in:

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Revocable Living Trust  | <input type="checkbox"/> Business Succession Plan | <input type="checkbox"/> Healthcare Surrogate |
| <input type="checkbox"/> Last Will and Testament | <input type="checkbox"/> Medicare Set Aside Trust | <input type="checkbox"/> Other (_____)        |
| <input type="checkbox"/> Power of Attorney       | <input type="checkbox"/> Special Needs Trust      |   |
| <input type="checkbox"/> Living Will             | <input type="checkbox"/> Preneed Guardian         |   |

**6. Homestead Exemption:**

- I have applied for a Homestead Exemption for my primary residence.  
 I am not eligible for a Homestead Exemption.  
 I'm not sure.

**7. Gifting and Charitable Giving:**

- I am interested in incorporating gifting strategies into my estate plan.
- I am not interested in gifting or charitable giving in my estate plan.

**8. Beneficiary Designations:**

- I have reviewed and updated beneficiary designations for my retirement accounts and life insurance policies.
- I need assistance with updating beneficiary designations.
- I'm not sure.

**9. Legal Guardian for Minor Children:**

- I have designated a legal guardian for my minor children in my estate plan.
- I need assistance with designating a legal guardian.
- I'm not sure.

**10. Digital Asset Planning:**

- I have considered digital asset planning and have a plan in place.
- I need assistance with including digital assets in my estate plan.
- I'm not sure.

**11. Long-Term Care Planning:**

- I am interested in long-term care planning to protect my assets and ensure healthcare coverage.
- I have a long-term care plan in place.
- I'm not sure.

**12. Family Business Succession:**

- I have a family business, and I am interested in succession planning to ensure a smooth transition.
- I need assistance with family business succession planning.
- I'm not sure.

**13. Family Communication and Education:**

- I have discussed my estate plan and asset protection strategies with my family.
- I need guidance on communicating my estate plan with my family.
- I'm not sure.

**14. Tax Planning Strategies:**

- I am interested in tax planning strategies to minimize estate and gift taxes.
- I need assistance with tax planning.
- I'm not sure.

**15. Trustee and Executor Selection:**

- I have selected trustees and executors for my estate plan.
- I need assistance with selecting trustees and executors.
- I'm not sure.

**16. Additional Comments or Questions:**