

What's Your Next Move?

We all go through life in a constant state of either being ready or not for the events and circumstances which we will face. This is equally true for our Estate Planning.

The fact is we really don't know when we might become disabled, when we might face an unexpected financial adversity, or when we will exit this life. The reality is that even the best laid plans can change quickly (or at least more quickly than we anticipated), due to unforeseen business, financial, personal, health and family changes in circumstances.

The Boy Scout motto is "be prepared". It is good advice, and it is particularly applicable in Estate Planning.

Just as you would not take a trip or undertake some new venture without adequate preparation, you wouldn't want to venture into your foreseeable or unforeseeable future without adequate preparation.

So. Where do you stand? How ready are you for the expected or the unexpected? Bob and Betty* are now ready. Are you?

Below is an Estate Plan Fitness Test which we've designed to help you to answer that question. At the end of this test you should have a better idea of the answers to the following two fundamental questions:

Fundamental Questions.

I intend to address the following questions:

- What will be the probable, almost certain, future outcome of my present course, if left unchanged?
- What's missing, the presence of which would make a substantial difference in producing a better outcome?

*While the examples mentioned in this book are based on actual clients' situations, the names and certain facts have been changed in order to protect their privacy.