

## Our Concerns

| <b>For each question, please designate an "H" for high level of concern, "M" for medium level of concern, "L" for low level of concern or NA if not applicable</b> | <b>Level of Concern</b> |
|--|-------------------------|
| 1. Desire to get affairs in order and create a comprehensive plan to manage affairs in case of death or disability.  | 1.                      |
| 2. Providing for and protecting a spouse.  | 2.                      |
| 3. Providing for and protecting children.  | 3.                      |
| 4. Providing for and protecting grandchildren.   | 4.                      |
| 5. Disinheriting a family member.  | 5.                      |
| 6. Providing for charities at the time of death.   | 6.                      |
| 7. Plan for the transfer and survival of a family business.  | 7.                      |
| 8. Avoiding or reducing your estate taxes.   | 8.                      |
| 9. Avoiding probate.   | 9.                      |
| 10. Reduce administration costs at time of your death.   | 10.                     |
| 11. Avoiding a guardianship or conservatorship in case of a disability.  | 11.                     |
| 12. Avoiding will contests or other disputes upon death.   | 12.                     |
| 13. Protecting assets from lawsuits or creditors.  | 13.                     |
| 14. Preserving the privacy of affairs in case of disability or at time of death from business competitors, predators, dishonest persons and curiosity seekers.     | 14.                     |
| 15. Plan for a child with disabilities or special needs, such as medical or learning disabilities.   | 15.                     |
| 16. Protecting children's inheritance from the possibility of failed marriages.  | 16.                     |
| 17. Protect children's inheritance in the event of a surviving spouse's remarriage.  | 17.                     |
| 18. Provide that your death shall not be unnecessarily prolonged by artificial means or measures.  | 18.                     |

Other Concerns (Please list below):

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