LINEWEAVER
financial group

9035 Sweet Valley Dr.   Phone: (216) 520-1711
Valley View, OH 44125   Fax: (216) 520-1709
lineweaver.net

LEGAL DOCUMENT AUDIT

Basic Audit:

1. Do you have a **PROFESSIONALLY PREPARED WILL**?   Yes ☐   No ☐

    If it is a do-it-yourself will?

        Yes ☐   No ☐

    Has your will been reviewed by knowledgeable legal counsel to evaluate its appropriateness?

        Yes ☐   No ☐

2. Has **YOUR WILL BEEN UPDATED OR REVIEWED** during the past 5 years to make sure it reflects changes in your situation (e.g. the appropriate beneficiaries, executors, etc.)?

        Yes ☐   No ☐

3. Do you have a **FINANCIAL POWER-OF-ATTORNEY** in the event of incapacity for any reason?

    Yes ☐   No ☐

4. Do you have an **ADVANCED MEDICAL DIRECTIVE** so those you designate can talk with medical personnel?

    Yes ☐   No ☐

    If yes, does the directive include someone in addition to your spouse?

        Yes ☐   No ☐

5. Do your assets contain **TRANSFER-ON-DEATH INSTRUCTIONS** so that your assets can avoid probate court expenses, delays and claims by creditors?

    Yes ☐   No ☐

    Or is another plan more suitable for your situation?

        Yes ☐   No ☐

6. Are all important documents, such as life insurance policies, deeds, titles, investment accounts, and other legal documents listed in an organized manner?

      Yes ☐   No ☐

      If yes, Do family members or executors know the location of these documents, and can they be easily accessed?

            Yes ☐   No ☐

Advanced Audit:

7. Should I consider a **PROBATE AVOIDANCE TRUST** which will provide for the administration of my assets during times of incapacity and avoid Probate upon death?

      Yes ☐   No ☐

8. Is my estate large enough to require a **TAX SHELTERED TRUST** to avoid or limit State <u>and</u> Federal taxes?

      Yes ☐   No ☐

9. Do I need an **IRREVOCABLE TRUST** to protect assets from the catastrophic costs of long-term care or to pay my estate taxes?

      Yes ☐   No ☐

10. Do I have an **INTEGRATED ASSET PROTECTION** plan?

      Yes ☐   No ☐