

DO YOU NEED A TRUST OR WILL?



Regardless of income level or assets, everyone can benefit from having a trust or will. Having something in place, especially during this time of unpredictability and rapid change, brings peace of mind to you and your family. Having a trust or will in place eases the burden on your loved ones and ensures that your wishes are understood and met under any circumstances.

You may not even know all the ways that a good estate plan can help you and your family. A good plan will also keep to a minimum the taxes and fees assessed during assets transfers. We can help you design an estate plan that works for you. Please fill out the survey to see how critical estate planning is for you. Bring the completed survey to your initial meeting and receive \$100 off of your planning fees! Call us to schedule at 605-777-1772 or email info@HarrisLawTrust.com.

READY...SET...GO

YES NO ?

0	5		Do you have a will or a trust that confidently meets your goals in a protected, tax efficient manner?
3	0		Do you have children?
1	0		Do you or your spouse have children from a previous relationship?
2	0		Do you own property?
0	2		Do you know your goals for the distribution of your assets if you pass away?
1	0		When you pass away, do you want to provide for your children's or grandchildren's education?
0	2		Do you actually understand what estate planning is?
0	1		Do you know if (and how) having a plan in place protects you and your family from a disability?
0	1		Do you know the steps your loved ones would need to take when you pass away?
0	1		Do you know that tax planning is an option to help you avoid or minimize capital gains taxes?
0	1		Do you know what tax codes are and that they could affect your planning?
1	0		Will you receive an inheritance one day? Do you know how to receive it?
1	0		Do you need to plan to protect your children in the event they get divorced? Or have creditor problems?
5	0		Are you unmarried living with a significant other?
0	1		Did you know that having a plan in place can protect your children in the event your spouse remarries after you pass away?
3	0		Is your net worth \$3 million dollars or more (value of everything you own including life insurance)?



5 or More – **STOP**. Your planning may be in CRITICAL condition. Schedule a meeting today.

3 to 5 – **CAUTION**. Your planning requires attention. Schedule a meeting soon.

0 to 3 – **GO**. No plan puts you at risk, but it is up to you what level of risk you are comfortable with.

TOTAL: _____

WHAT IS YOUR SCORE?



HARRIS
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