

Use the *Legacy Matters Estate Organization Review™* chart below to see where you are at.

Rate your answers from #1 being the lowest, to #10 being the highest.

Add up each column and put your total score in the **YOUR SCORE** box.

I have no clue how my estate is organized	1	2	3	4	5	6	7	8	9	10	I know exactly how my estate is organized
I do not have a valid will consistent with my estate plan	1	2	3	4	5	6	7	8	9	10	I have a valid will consistent with my estate plan
I do not have a current list of my assets and liabilities	1	2	3	4	5	6	7	8	9	10	I have a current list of my assets and liabilities
I have no idea what papers are important or where they are	1	2	3	4	5	6	7	8	9	10	I have a current list of my important papers and where they are
I have not made any beneficiary designations	1	2	3	4	5	6	7	8	9	10	My beneficiary designations reflect what I want
I do not have an Estate Trustee or Estate Plan	1	2	3	4	5	6	7	8	9	10	I have an Estate Trustee and an Estate Plan
I have no idea of the after tax income my family will receive when I die	1	2	3	4	5	6	7	8	9	10	I know the after tax income my family will receive when I die
I have no insurance in place to cover my Estate Taxes	1	2	3	4	5	6	7	8	9	10	I have insurance in place to cover my Estate taxes
My Estate Trustee has no clue where my important papers are	1	2	3	4	5	6	7	8	9	10	My Estate Trustee knows exactly what I want and where the papers are
I am not clear about how to create my Legacy Plan	1	2	3	4	5	6	7	8	9	10	I am clear about how to create my Legacy Plan
ADD COLUMN TOTALS											YOUR SCORE _____

Katherine Downey is the #1 Funeral Preplanning Professional in Canada for the 4th time. She is a professional educator, speaker and licensed funeral director specializing in prepaid funeral planning as well as a licensed insurance advisor specializing in Legacy planning. To set up your **Legacy Matters Estate Organization Review** consultation or if you need further information contact Kat at 905-717-9197 or 905-399-5341. Email katdowney@legacymatters.ca or visit www.legacymatters.ca