

Legacy Matters Review™

To help you understand your current situation, use the *Legacy Matters™* chart below. 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 feel stressed by my personal debt	1	2	3	4	5	6	7	8	9	10	I feel good about my personal debt
I do not feel it is necessary to insure my mortgage	1	2	3	4	5	6	7	8	9	10	I do feel it is necessary to insure my mortgage
I do not understand the benefits of having a RESP	1	2	3	4	5	6	7	8	9	10	I do understand the benefits of having a RESP
I am unaware of the advantages of having a guaranteed prepaid Funeral Plan	1	2	3	4	5	6	7	8	9	10	I am aware of the advantages of having a guaranteed prepaid Funeral Plan
I do not feel it is important to have Guaranteed Travel Protection	1	2	3	4	5	6	7	8	9	10	I do feel it is important to have Guaranteed Travel Protection
I do not feel the need for Permanent Insurance	1	2	3	4	5	6	7	8	9	10	I do feel the need for Permanent Insurance
I do not understand the importance of Long Term Care Coverage	1	2	3	4	5	6	7	8	9	10	I do understand the importance of Long Term Care Coverage
I do not feel the need to have Critical Illness Coverage	1	2	3	4	5	6	7	8	9	10	I do feel the need to have Critical Illness Coverage
I do not feel it is necessary to have a RSP plan	1	2	3	4	5	6	7	8	9	10	I do feel it is necessary to have a RSP Plan
I am not clear about how to create a Legacy Plan	1	2	3	4	5	6	7	8	9	10	I am clear about how to create a 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 Review** consultation or if you need further information contact Kat at **(905) 399-5341 or (905) 717-9197 or katdowney@legacymatters.ca**. She also invites you to visit her website at www.legacymatters.ca