ANGERMEIER & ROGERS, LLP
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Estate Planning "Check-up"

1. I have a current Health Care Power of Attorney to permit my spouse, children, or trusted friend to make emergency health care decisions for me in the event that I am unable to do so.   ❑ Yes ❑ No   ❑ Unsure

2. I have a current Durable Power of Attorney to permit my spouse, children, or trusted friend to handle my financial affairs in the event that I become disabled.   ❑ Yes ❑ No   ❑ Unsure

3. I have taken steps to nominate guardians for my minor children in the event that something should happen to me.   ❑ Yes ❑ No   ❑ Unsure

4. I have a plan to provide protection from creditors, lawsuits, and divorces for assets passed to my heirs.   ❑ Yes ❑ No   ❑ Unsure

5. I have taken steps to protect my children's inheritance in the event that my surviving spouse chooses to remarry.   ❑ Yes ❑ No   ❑ Unsure

6. I have recently checked the beneficiary designations of my retirement plans and life insurance policies, and I am confident that I have not listed my estate or any minors as a primary or secondary beneficiary.   ❑ Yes ❑ No   ❑ Unsure

7. I am certain that my current estate plan will minimize possible federal estate taxes at my death, including taxes on my house, life insurance and IRA's.   ❑ Yes ❑ No   ❑ Unsure

8. I have a Revocable Living Trust, and I am certain that my trust is fully funded which will avoid probate proceedings for my family.   ❑ Yes ❑ No   ❑ Unsure

At Angermeier & Rogers, we believe that a good estate plan should not only be technically correct and work as intended in the real world, but should also reflect your values as a person. We take the time to understand our clients' hopes, dreams, and goals so that we can help them secure the best quality of life today, the highest standard of care for tomorrow, and the greatest benefit for their loved ones in the future.

Please contact us to arrange your complimentary estate planning consultation.

Visit us online at **www.WIestateplanners.com**