



WealthMunshi

Your Estate Planning Solutions Start Here!

Doctors keep you artificially alive. In this case your Wealth goes to a Doctor or Hospital and also you have to bear lots of Pain.				
Have You created a 'Living Will' or Advanced Health Care Power of Attorney? YES <input type="checkbox"/> NO <input type="checkbox"/>				
17. Risk that your 'Incapacitated Child' 'Special Child' might not be looked after properly once both you and your spouse pass away.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you created an 'Special Child Trust'? YES <input type="checkbox"/> NO <input type="checkbox"/> Have you created a 'Letter of Instructions' for this Child? YES <input type="checkbox"/> NO <input type="checkbox"/>				
BUSINESS CONCERNS				
18. Risk that your Business might not run smoothly after you pass away?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you created a Business Succession Plan? YES <input type="checkbox"/> NO <input type="checkbox"/>				
19. Risk that after your business partner passes away, he/she might be succeeded by family members who may not have deceased partner business acumen, or you might not get along with them?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you created a Business Value Protection Trust? YES <input type="checkbox"/> NO <input type="checkbox"/>				
20. Risk of Creditors where you have stood Guarantor taking your Assets to pay the loan.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you created an 'Asset Protection Trust'? YES <input type="checkbox"/> NO <input type="checkbox"/>				
OTHER CONCERNS				
21. Risk of unnecessary costs and delays associated with the estate passing through probate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you created a 'Pass Through Trust'? YES <input type="checkbox"/> NO <input type="checkbox"/>				
22. Risk that the person(s) charged with managing your affairs after you've passed 'Your After Death Agent' will innocently make mistakes because he or she is unaware of what is required and is unaware of the personal liability for those mistakes.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you appointed a Trustworthy and Capable person as your Executor? YES <input type="checkbox"/> NO <input type="checkbox"/>				
23. Risk of private matters unnecessarily being made public.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Have you created a Private Family Trust? YES <input type="checkbox"/> NO <input type="checkbox"/>				
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Name: _____ Email: _____ Tel.: _____