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Your Legal Health Checkup

Have you had your legal 'checkup' recently? Oftentimes visiting an attorney is like visiting your physician. You go to make sure that your physical health is in order. The same should be done when you visit with your attorney. Most people do not realize that they do not have their legal status in healthy working order. Please review this list and see how your 'legal health' stacks up.

PLEASE ANSWER EACH LINE WITH YES, NO OR ?

_____ I have an updated Will or Trust.

_____ I do have a Testamentary Trust, or I do not have an heir under 25.

_____ I have a valid and updated Durable Power of Attorney.

_____ I have a valid and updated Health Care Power of Attorney.

_____ I have a valid Living Will.

_____ I have at least a primary and secondary beneficiary named on my IRAs.

_____ I have at least a primary and secondary beneficiary named on my 401k or other pension plans.

_____ The person(s) named are my intended beneficiaries.

_____ I have at least a primary and secondary beneficiary on all Life Insurance Policies.

_____ I have the deed to my house recorded with the correct individual(s) named on it.

_____ I have provided for who may care for my minor children in a valid legal document if I die or become disabled.

_____ I have a list of all my important documents and assets, and I have informed my personal representative of its location.

_____ If I am preparing to marry or live with someone, I have a prenuptial agreement or cohabitation agreement detailing our rights in case the relationship ends. I understand cohabitation agreements are not limited to same sex couples.

_____ If I am about to have a roommate, I have a legal agreement detailing who owns what items and the responsibilities for the obligations.

_____ If I recently divorced or had the loss of a spouse, I have reviewed all the changes that I addressed all the issues above.

If you are a missing check mark next to any of these items or do not know or understand the importance of any of these items, do not hesitate to ask your attorney what can be done to tie up any loose ends! Call one of our secretaries today to schedule your checkup.

You can upload this questionnaire to us in advance of your appointment in order to allow us to review and make your appointment more effective.

<https://www.hightail.com/u/Mannlaw>