



Given that we are all locked down, now is a good opportunity to review our estate plans. We invite you to complete the following questions and send back to us for our records.

All information recorded is always kept confidential.

Estate planning is often put off until it is too late. Imagine that you are suddenly ill or you die. Your partner or your children are not aware of your most recent estate information. As your financial advisors, we could be called upon to offer guidance or information to your family in that time of need.

Please put us in a position where we can help.

QUESTIONS:

- Will –
  - Do you have a will? \_\_\_\_\_
  - Who is your lawyer? \_\_\_\_\_
  - How recent? \_\_\_\_\_
  
- Funeral arrangements –
  - Have you made funeral arrangements? \_\_\_\_\_
    - With whom? \_\_\_\_\_
  
- Powers of attorney –
  - Do you have POA's? \_\_\_\_\_
  - Personal Care POA: \_\_\_\_\_
  - Financial Decisions POA: \_\_\_\_\_
  
- Life Insurance –
  - Please list your policies and policy numbers, and/or send us a copy of the policy statements.
  - \_\_\_\_\_
  - \_\_\_\_\_
  
- Beneficiaries -
  - Do we have the correct person named as your beneficiary on investments and/or life insurance policies?
  - \_\_\_\_\_
  - \_\_\_\_\_

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- Disabilities –
  - Are there family members with disabilities? Explain.  
\_\_\_\_\_  
\_\_\_\_\_
  
- Property –
  - Do you own or rent your property? \_\_\_\_\_
  - Jointly or individually? \_\_\_\_\_
  
- Comments/concerns?  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

We are always available for calls and would be happy to assist you in this process.

Your information is kept strictly confidential. The financial regulators require that we inform you that your data will be stored in the cloud.

Thank you for your on-going business. We appreciate that.

Sincerely,

*Bruce Youngblud, CFP, CIM*

*Kennedie Demain*

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