AKM Family Financial Services

January 2007

Asset Protection Questionnaire

Having it is one thing and knowing you have it is something else, but the big question is whether you've planned strategically in order to keep it. This brief questionnaire touches on nearly every aspect of your financial life. Take a few moments to complete it and send it back to us so we can help you plan for a brighter future with fewer worries.

Your name:

	YES	NO	DON'T KNOW
Would you like to consider **annual gifts** to your children or grandchildren?	☐	☐	☐
Do you have the time and expertise to **coordinate** your financial matters the way you would like to?	☐	☐	☐
Have you reviewed your **estate plan** within the past five years?	☐	☐	☐
Have you reviewed your **life**, **disability** and **long-term care insurance** policies within the past two years?	☐	☐	☐
Are your assets completely protected from creditors in the event of a **lawsuit**?	☐	☐	☐
Do you feel confident that your finances and assets are being utilized as **efficiently** and **effectively** as possible?	☐	☐	☐
Have you looked at the **beneficiary designations** on all your accounts (IRA, 401(k), brokerage accounts, insurance policies, etc.) within the past year?	☐	☐	☐
Do you have any concerns that your **insurance policies** are not covering you adequately?	☐	☐	☐
Are you sure that your **portfolio** is allocated in accordance with your wishes (risk tolerance, growth needs, etc.) even after factoring in recent economic changes?	☐	☐	☐
Have there been any **significant changes** in the past year in your personal, business or financial life?	☐	☐	☐
Do you know exactly how your **property will pass** in the event of your death and how any applicable federal, state and local taxes will be paid?	☐	☐	☐
Have you executed legal documents to ensure that your wishes are carried out if you become **incapacitated or seriously ill** (healthcare proxy, durable power of attorney, living will)?	☐	☐	☐
Has your **mortgage** been reviewed within the past year to ensure that you have the best available arrangement?	☐	☐	☐
Have you reviewed your **retirement savings plans** and options within the past year?	☐	☐	☐
Do you know how you will finance your children's or grandchildren's **education**?	☐	☐	☐

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