

The Big Four Questions Cheat Sheet

Question One: Who Do You Trust to Handle Financial Decisions For You?

If you were in a car accident and in a coma for three months, who would you trust to control finances, pay bills, and make sure that when you got out of the hospital, you weren't left with utilities turned off and items being repossessed? Or if you died, who makes sure that everyone gets what they're supposed to get, and when they are supposed to get it?

- 1) _____
- 2) _____
- 3) _____

Question Two: Who Do You Trust to Handle Health Care Decisions For You?

If you were to put all of your plans and documents in place, and then you (and your spouse/partner) were in a car accident and in a coma for three months, who would you trust to direct medical personal, make decisions regarding your treatment, sign off on surgery A versus surgery B, and sign all of the paperwork required when someone is admitted to a hospital?

- 1) _____
- 2) _____
- 3) _____

Question Three: If you pass on, who gets what, when, and maybe even how?

If you were to pass on, who would be your beneficiaries, when would they receive their inheritance, and are there any conditions.

1) Start with any items or assets going to people "off the top."

2) The list percentages of the estate and who gets them

3) Finally, list an age of inheritance

Question Four: Who raises minor children if you pass on?

If you were to pass on while children were still underage, then who would you wish to continue raising your children until they turned eighteen years of age?

- 1) _____
- 2) _____
- 3) _____

Additional Resources

www.Trust101Webinar.com

www.YouTube.com/nclawyer

www.EstateCrashCourse.com