

# ESTATE PLANNING CHECKLIST – DO I NEED A PLAN?

NAME: \_\_\_\_\_

PHONE: \_\_\_\_\_

EMAIL: \_\_\_\_\_

1. ARE YOU MARRIED OR DIVORCE?                      YES \_\_\_\_\_ NO \_\_\_\_\_
2. HAVE YOU REMARRIED?                              YES \_\_\_\_\_ NO \_\_\_\_\_
3. DO YOU HAVE CHILDREN?                            YES \_\_\_\_\_ NO \_\_\_\_\_
  - a. FROM PAST MARRIAGE?                            YES \_\_\_\_\_ NO \_\_\_\_\_
  - b. FROM CURRENT MARRIAGE?                        YES \_\_\_\_\_ NO \_\_\_\_\_
  - c. UNDER 18 YEARS OLD?                            YES \_\_\_\_\_ NO \_\_\_\_\_
  - d. SPECIAL NEEDS OR DISABLED?                    YES \_\_\_\_\_ NO \_\_\_\_\_
4. DO YOU OWN A BUSINESS?                            YES \_\_\_\_\_ NO \_\_\_\_\_
5. DO YOU HAVE A BUSINESS PLAN?                    YES \_\_\_\_\_ NO \_\_\_\_\_
6. DO YOU OWN A HOME/MORTGAGE?                    YES \_\_\_\_\_ NO \_\_\_\_\_
7. DO YOU HAVE LIFE INSURANCE?                    YES \_\_\_\_\_ NO \_\_\_\_\_

**WE HELP FAMILIES AND BUSINESS OWNERS PROVIDE SECURITY AND PROTECTION FOR THE PEOPLE AND THINGS THEY LOVE, WHILE ALIVE, AND AFTER THEY TRANSITION WHICH KEEPS CHALLENGING FAMILY MEMBERS AT BAY. IF YOU ANSWERED YES TO ANY OF THE ABOVE AND YOU DO NOT HAVE A WILL OR ESTATE PLAN, YOU NEED ONE. CALL US TODAY!**

**1-888-419-4557**

**Graham Estate Planning**

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