

DO YOU NEED A TRUST? CHECKLIST

	YES	NO
1. Is the Net Worth of Your Estate (including Life Insurance, Retirement, and Equity in your Home) approaching \$4 Million?	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you need a Trust to Avoid Probate?	<input type="checkbox"/>	<input type="checkbox"/>
3. Do you have a "Complicated" Family Situation?	<input type="checkbox"/>	<input type="checkbox"/>
A. Blended Family	_____	_____
B. In-Law Problems	_____	_____
C. Children are Spendthrifts or are Minors	_____	_____
4. Do you want to make sure your children receive their inheritance? (Surviving Spouse Re-Marriage)	<input type="checkbox"/>	<input type="checkbox"/>
A. Spousal Share	_____	_____
B. Spousal Award	_____	_____