Beneficiary Preparedness Diagnostic

Indicate the degree to which you *agree* or *disagree* with the statements below. Once you are finished, total your score.

		Disagree									Agree	Score
1.	Our process to identify critical documents that our loved ones may need is thorough and complete.	1	2	3	4	5	6	7	8	9	10	
2.	Our loved ones know exactly where we keep our important documents and they can access them easily.	1	2	3	4	5	6	7	8	9	10	
3.	We have compiled a comprehensive file of resources (documents and information) enabling our executor to carry out our wishes in the most efficient, cost effective and timely manner.	1	2	3	4	5	6	7	8	9	10	
4.	We carefully named our beneficiaries, using per stirpes as necessary, to avoid disinheriting a loved one, such as a grandchild.	1	2	3	4	5	6	7	8	9	10	
5.	We use a system to keep our beneficiary designations up to date and complete.	1	2	3	4	5	6	7	8	9	10	
6.	We know who will best advise our beneficiaries. Their specialized knowledge and resources in complex rules inherited retirement accounts will help our beneficiaries to avoid costly tax mistakes.	1	2	3	4	5	6	7	8	9	10	
7.	All parts of our long-term care plans are well-defined and carefully organized in order to minimize disruption in in our loved ones' daily lives.	1	2	3	4	5	6	7	8	9	10	
8.	Our loved ones will not have to face the unnecessary burden of trying to figure out where an important document may be filed.	1	2	3	4	5	6	7	8	9	10	
9.	There is a solid bridge for the transfer of information from one generation to the next.	1	2	3	4	5	6	7	8	9	10	
10.	We have peace of mind knowing that we have done our best for our loved ones and nothing important will be overlooked.	1	2	3	4	5	6	7	8	9	10	

Securities and investment advisory services offered through H. Beck, Inc. Member FINR/SIPC.
H. Beck, Inc. and KLM Financial & Insurance Services are unaffiliated.

TOTAL SCORE

The **greatest challenge interfering with our efforts** to create a solid bridge for the transfer of information one generation to another is:

_____

_____

_____

_____

_____

(Use back of page if necessary)

Name: _____

Phone Number: _____

Kelly Monroe 1840 Gateway Drive Suite 200, Foster City, CA 94404 P: 650-378-1222
www.kellymonroe.com