



EVALUATING WHERE YOU ARE IN YOUR PLANNING

Evaluation #1:

I am totally familiar with our current financial situation, what our current “estate plan” does and my spouse and I are on exactly the same page regarding what it will do.

1...2...3...4...5...6...7...8...9...10

Evaluation #2:

We have fully disclosed to our heirs all the details of our inheritance plans for them and as a family we are all in full support of the overall plan.

1...2...3...4...5...6...7...8...9...10

Evaluation #3:

Our heirs are fully prepared spiritually, emotionally, and financially to receive the inheritance we have determined is appropriate for them. It will bless and not curse them.

1...2...3...4...5...6...7...8...9...10

Evaluation #4:

Our heirs are fully prepared to continue on with our Kingdom giving legacy after we are gone.

1...2...3...4...5...6...7...8...9...10

Evaluation #5:

We have created and implemented a \$0 estate tax wealth distribution plan.

1...2...3...4...5...6...7...8...9...10

Evaluation #6:

Our current plan provides for maximum Kingdom impact during our life time and after we eternally relocate.

1...2...3...4...5...6...7...8...9...10

Evaluation #7:

Our advisors are both highly skilled at their professions as well as committed Christians who are counseling us with biblical wisdom within the context of a Christian worldview.

1...2...3...4...5...6...7...8...9...10

Evaluation #8:

All our professional advisors work together as an efficient and unified planning team to achieve the best possible planning outcomes for us.

1...2...3...4...5...6...7...8...9...10

Evaluation #9:

I have found my personal “Fire Within” and am fully utilizing my God-given passions and talents for a God-given purpose.

1...2...3...4...5...6...7...8...9...10

Evaluation #10:

Acknowledging that God owns all we have, we have clearly established how much is enough of His wealth for us to consume annually on our lifestyle.

1...2...3...4...5...6...7...8...9...10

Total Number _____

YOUR PLANNING EVALUATION

10 – 50 – You need to get serious about planning!

51 – 70 – You are like most affluent families. You have done some good planning, but a great deal of additional work still needs to be done.

71 – 85 – You are well on your way. Creative fine tuning will help maximize your planning outcomes.

86 – 100 – You should write a book and be leading private briefings. Great job!