



ESTATE RISK ASSESSMENT QUIZ

Last Review Date:

Qn	Description	Yes	No
1	Do you have dependents (children, elderly parents etc..) who is/are relying on your income?		
2	Do you own a home or business, or any other significant assets?		
3	Do you have any specific wishes for how your assets should be distributed after your death?		
4	Do you have a Will and/or a (Living) Trust already in place?		
5	Do you wish for lower legal costs and shorter time your family will spend during Probate?		
6	Do you have any minor children for whom you would like to appoint a guardian?		
7	Have you discussed your end-of-life wishes with your family or appointed a donee?		
8	Do you have specific charitable organisations you wish to support through your estate?		
9	Do you have life insurance policies or retirement accounts that need beneficiary designations?		
10	Are your beneficiaries within the family on good terms with one another?		

Turn to page 2 to tally the scores and get the interpretations.



SCORING (ADD UP POINTS)

Qn	Yes	No
1	2	0
2	2	0
3	2	0
4	0	3
5	2	0

Qn	Yes	No
6	3	0
7	0	2
8	1	0
9	2	0
10	0	2

SCORING & INTERPRETATION

Points	Description
0-4	You may not have significant immediate risks, but it's still wise to consider planning for the future.
5-10	You have some risk factors that could lead to complications without an estate plan. Consider starting the planning process soon.
11-15	You have several significant risks. It's important to address your estate planning needs to avoid potential problems.
16+	You face high risks without an estate plan. Taking action now is crucial to ensure your wishes are honoured and to protect your loved ones.