

Name \_\_\_\_\_

## The Law Offices of Berge & Berge, LLP Client Self-Assessment Form

	Potential Issue	Problem	No Problem	Unknown or N/A
1	My personal circumstances have changed and I need to update my trust. <i>During your consultation, the attorney will review the topics you feel are important and discuss options with you.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	I would like to discuss whether my trustee list was prudently chosen. <i>The attorney has extensive experience with trustees and can provide insight in to the duties and responsibilities they must fulfill.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	I am interested in reviewing the newest standard wish list for health care directives to make sure mine covers every issue upon which a doctor might need a decision. <i>As the health care industry advances, we sometimes find the need to be clearer about personal wishes for medical care.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	I am concerned about recent changes in the HIPAA law which affects the validity of my living trust and my advance health care directive. <i>Effective August of 1996, every estate plan needed an update in order to comply with the new HIPAA law.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Does your Will contain a provision that grants your Executor the right to receive confidential medical information about you after your death in order to defend your wishes against contest? <i>We can add a provision that takes care of this.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	I am interested in knowing whether my trust is still appropriate for the size of my estate. <i>For a modest estate it may be necessary to simplify the provisions of the trust. For a larger estate it may be necessary to augment the documents.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	I want to protect myself and my family from the possibility of loss due to divorce, lawsuits, creditors, catastrophic illness, and future estate taxes. <i>You worked hard for your money – why let someone take it from you or your family?</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Do you have a plan to keep your living trust and other estate planning documents current? <i>Besides death and taxes, the only other certainty in life is change: your health changes, your finances change, your relationships change, and tax and other laws change.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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9	I am unsure whether I have transferred ownership of my home, rental properties, and investment accounts to my trust. <i>Failure to fund a trust is the #1 reason why most living trusts fail.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	I am concerned about the recent changes in the law affecting my living trust. <i>You'll be surprised to learn how current federal estate taxes and GST taxes affect you!</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	My family member passed away and I am not sure whether the formal legal process has been completed by either an attorney or a court. <i>With a trust, this process is called Trust Administration and without a trust, it's called Probate. We can help you with both.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12	I recently learned that my family member did not prepare for their long term care needs and that they could use a financial supplement for their health care and daily needs. <i>You will learn how to do pre-needs planning for yourself and/or provide care to your family member who is currently in need.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13	I would like to employ all possible tactics for my multi-faceted estate (e.g. business interests, large personal estate, etc.). <i>The prudent use of LLCs, Corporations, Charitable Organizations, etc. can act as a one-time-setup insurance policy for your estate.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14	Are you responsible for a child or adult with special needs? What would happen to him or her if you were to die unexpectedly? <i>Setting aside money or housing in a special account (so they don't lose public benefits) may be a good option.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15	I want my family to receive the most benefit from my IRAs. <i>Learn how to maximize their value and minimize losses where possible.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16	Life insurance is not income-taxable but IS estate taxable. <i>If your life insurance puts you above the estate tax limit then it is important to follow the proper estate planning procedure to make sure taxes are reduced as much as possible.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
17	I believe my family member is susceptible to undue influence and/or is being mistreated financially or physically and I'm not sure what I can do to help. <i>We offer free consultations to anyone in this position.</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>