

ASSET PROTECTION WORKSHEET

Asset protection includes much more than preparing for long-term care. We're here to help you create a plan and assist your trustees as they implement the plan to ensure that you are best prepared for any long-term care situation that could arise in the future.

FILL OUT THIS BRIEF QUESTIONNAIRE TO HELP US CRAFT YOUR TAILORED ASSET PROTECTION DOCUMENTS

ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL

CLIENT DETAILS

Name: _____ SSN (required): _____
Date of Birth: _____
Single ___ Married ___ Date of Marriage: _____ Divorced ___ Widowed ___
Address: _____
Phone: _____ Email: _____
Veteran: ___ Branch of Service: _____ Service Dates: _____

Spouse's Name: _____ SSN (required): _____
Date of Birth: _____ Deceased: ___ Date of Death: _____
Phone: _____ Email: _____
Veteran: ___ Branch of Service: _____ Service Dates: _____

Children's Names	Dates of Birth	Whose Children
_____	_____	Joint ___ His ___ Hers ___
_____	_____	Joint ___ His ___ Hers ___
_____	_____	Joint ___ His ___ Hers ___
_____	_____	Joint ___ His ___ Hers ___
_____	_____	Joint ___ His ___ Hers ___
_____	_____	Joint ___ His ___ Hers ___

Trustee Information

Trustees are the individuals who will be in charge of managing your trust. Under an Irrevocable Asset Protection Trust, they will have the power to manage, invest, and control your assets upon signing. Neither you nor a spouse may serve as Trustee of an Irrevocable Asset Protection Trust. Multiple Trustees can serve together. For Co-Trustees, please include all names on a single line. Co-Trustee Decision-Making Selection: Independent Authority, Majority, or Unanimous.

Name	Co-Trustee Decision-Making Selection
1. _____	_____
2. _____	_____
3. _____	_____

Beneficiary Distributions

Funds can be left to beneficiaries Outright (one lump-sum distribution) at a given age (the default age if none is listed will be 25).

Funds can be left to beneficiaries In Trust. This means that funds will be dispersed at given ages or in segments of years following death (Examples: at age 25, age 30, age 35 or at 5 years, 10 years, 15 years following death) (can protect beneficiaries from creditors, bankruptcy, divorce).

Name	Share %	Outright/In Trust	Ages/Years

Concerns About Beneficiaries or Trustees

Special Needs ____

Potential Divorce ____

Potential Drug Abuse ____

Potential Financial Mismanagement ____

Potential Bankruptcy ____

Potential Legal Liabilities (Professional subject to malpractice) ____

Potential Need of Government Assistance (financial aid, Medi-Cal, disability, food stamps) ____

Power of Attorney (POA)

The person you want to act as your agent over your financial affairs in the event you are not able to make your own financial decisions or are incapacitated (expires upon death).

This is an individual document (each spouse can list different individuals as POA).

If married, it is recommended to select your spouse first unless they are incapacitated.

Multiple POAs can serve together. For Co-POAs, please include all names on a single line.

Co-POA Decision-Making Selection: Independent Authority, Majority, or Unanimous.

Name	Co-POA Decision-Making Selection
1. _____	
2. _____	
3. _____	

