
TURNING INTENTIONS INTO REALITY: HOW COMPLETE IS YOUR ESTATE PLAN?

Please fill in your responses to the questions below.

DOCUMENTING FINAL WISHES

Yes No

- Do you have a will?
- Does your will name a guardian for your children if both you and your spouse are deceased?
- Are you comfortable with the executors(s) and trustee(s) you have selected?
- Have you documented your final wishes for burial and organ donation?
- Have you talked with your family about your final wishes?

PLANNING IN CASE OF INCAPACITATION

Yes No

- Do you have a medical power of attorney or health care proxy?
- Do you have a living will?
- If you have a medical power of attorney or living will, have you given copies to your family and physician?
- Are you familiar with the laws of your state regarding living wills?
- Do you have a long term care policy?

TRANSFERRING YOUR ASSETS SMOOTHLY WITH MINIMAL COSTS

Yes No

Have you recently reviewed beneficiary designations on the following assets to make sure they are complete and current?

- Individual Retirement Accounts (IRA and ROTH)
- Qualified Plans (such as 401(k))
- Insurance Policies (including annuities)
- Non-Qualified Assets (Set-up Transfer on Death (TOD) if available)

- Are both your estate plan and your spouse's designed to take advantage of the unified credit amount?
- Are you taking full advantage of the marital deduction?
- Have you considered a living trust to avoid probate?
- If you have a living trust, have you titled your assets in the name of the trust?
- Have you considered an irrevocable life insurance trust?
- Are you taking maximum advantage of the \$12,000 annual gift tax exclusion?

Continued on reverse...

Investment and insurance products distributed by Genworth Financial Securities Corp., member NASD/SIPC and a licensed insurance agency (dba Genworth Financial Securities and Insurance Services in CA); investment advisory services are offered through Genworth Financial Advisers Corp., an SEC Registered Investment Adviser. Home offices at 200 N. Martingale Rd., Schaumburg, IL 60173; phone 888 528.2987.

Yes No

- Have you considered creating trusts that qualify for the annual gift tax exclusion?
- Have you gifted assets that have a strong probability of future appreciation?
- Have you considered a charitable remainder trust?
- Have you considered a charitable income trust?
- Are you sure you have the right amount and type of insurance?
- If you own your business, do you have a management succession plan for your business?
- Do you have a funded buy-sell agreement for your business interests?
- Are you sure your estate plan is up to date and takes into account all potential tax-savings strategies?

Seek advice for any "No" answer to find out what options are available.

Investment and insurance products distributed by Genworth Financial Securities Corp., member NASD/SIPC and a licensed insurance agency (dba Genworth Financial Securities and Insurance Services in CA); investment advisory services are offered through Genworth Financial Advisers Corp., an SEC Registered Investment Adviser. Home offices at 200 N. Martingale Rd., Schaumburg, IL 60173; phone 888 528.2987.