



1. If you are currently married, do you (or your spouse) have children from a prior relationship?
Yes ☐ No ☐
2. Are you (or your spouse) the owner of a LLC (limited liability company) interest, partnership interest, or interest in a closely held business?
Yes ☐ No ☐
3. Do you (or your spouse) own commercial real estate?
Yes ☐ No ☐
4. Do you (or your spouse) own an interest in real estate in more than one state or country?
Yes ☐ No ☐
5. Do you have an estate that could be valued for tax and administration purposes at more than \$1 million at death (\$2 million for a married or registered couple)? The answer to this question is YES if you estimate the sum of the following to be greater than \$1 million (\$2 million for a married or registered couple):
 - a. The total value of your retirement accounts if any (IRA, 401 K., 403B, PERS or SEP-IRA).
 - b. The total value of your savings accounts if any.
 - c. The fair market value of your home.
 - d. The death benefit (amount your beneficiary receives on your death) of any life insurance on your life (and the life of your spouse).Yes ☐ No ☐
6. Are you anticipating a large inheritance in the near future?
Yes ☐ No ☐
7. Do you, your spouse or any of your children have any special, financially-significant health issues?
Yes ☐ No ☐
8. Are either you or your spouse foreign residents or citizens of another country?
Yes ☐ No ☐

If your answer to each question (1- 8) is " NO," then you likely qualify for the Wool Landon Emerging Estate Plan. If you answered any of the questions " YES," you may need more detailed estate planning services. Our team is equally experienced with mid-level and high net worth family and business succession planning. We will gladly estimate the cost of providing you with an estate plan that matches your current needs and your budget.

