

EVALUATING WHERE YOU ARE IN YOUR PLANNING

- #1: I am totally familiar with our current financial situation, what our current “estate plan” does and my spouse and I are on exactly the same page regarding what it will do. 1 2 3 4 5 6 7 8 9 10
- #2: We have fully disclosed to our heirs all the details of our inheritance plan for them, and as a family we are all in full support of the overall plan. 1 2 3 4 5 6 7 8 9 10
- #3: Our heirs are fully prepared spiritually, emotionally, and financially to receive the inheritance we have determined is appropriate for them. It will bless and not curse them. 1 2 3 4 5 6 7 8 9 10
- #4: Our heirs are fully prepared to continue on with our Kingdom giving legacy after we are gone. 1 2 3 4 5 6 7 8 9 10
- #5: Our stewardship plan minimizes or eliminates incomes, capital gain, and estate taxes. 1 2 3 4 5 6 7 8 9 10
- #6: Our current plan provides for maximum Kingdom impact during our lifetime and after we eternally relocate. 1 2 3 4 5 6 7 8 9 10
- #7: Our advisors are both highly skilled at their professions as well as committed Christians who are counseling us with biblical wisdom, within the context of a Christian worldview. 1 2 3 4 5 6 7 8 9 10
- #8: All our professional advisors work together as an efficient and unified planning team to achieve the best possible planning outcomes for us. 1 2 3 4 5 6 7 8 9 10
- #9: I have found my personal “fire within” and am fully utilizing my God-given passions and talents for a God-given purpose. 1 2 3 4 5 6 7 8 9 10
- #10: Understanding that God owns all that we have, we have drawn a financial finish line for how much is enough for our lifestyle and our net worth. 1 2 3 4 5 6 7 8 9 10

Total Number: _____

YOUR PLANNING EVALUATION

10-50: You might want to seek planning assistance!

51-70: You have done some good planning, but a great deal of additional work needs to be done.

71-85: You are well on your way. Creative fine-tuning will help maximize your planning outcomes.

86-100: You should write a book and teach others to do this. Great job!

Most affluent Christians fall between 51-70.

