

# Your Custom Title

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**Mark Reynolds**  
Title

### ✓ LEGACY PLANNING SURVEY

## Assess Your Estate Conservation Strategy

*Take a Moment to Ensure That Your Wishes Are Documented*

Although it may be difficult to think about estate planning issues, documenting your preferences now could help ensure that your legacy is handled according to your wishes. By filling out this simple survey and returning it in the enclosed envelope, you will help us determine whether your estate conservation needs are being adequately addressed.

### Do you have a valid and up-to-date will?

- Yes       No       Not sure

### Have your personal circumstances or financial situation changed since your will was drafted or last updated?

*(Check all that apply)*

- Birth or adoption of a child or grandchild  
 Divorce (you or your child)  
 Marriage or remarriage (you or your child)  
 Substantial change to your net worth  
 Acquisition or sale of property  
 Death of someone named in your will  
 Relocation to another state  
 Your intentions have changed  
 Tax laws have changed  
 Other \_\_\_\_\_

### Have you updated your beneficiary designations for the following types of "accounts" that generally supersede instructions in a will? *(Check all that apply)*

- Life insurance policies  
 Individual retirement accounts  
 Employer-sponsored retirement plans [e.g., 401(k), 403(b), and 457]  
 Pension plans  
 Annuities

### Have you considered these other estate planning documents? *(Check all that apply)*

- Trust agreements  
 Powers of attorney  
 Living will and health directive

**Do you expect your estate to be subject to federal and/or state estate taxes?**

- Yes       No       Not sure

**Have you established any trusts for the following purposes?**

To specify how assets should be distributed after your death?

- Yes       No

To help avoid probate and estate taxes?

- Yes       No

To care for beneficiaries who are disabled or mentally incapacitated?

- Yes       No

**Are you concerned that the face value of your life insurance policy may not offer the same level of protection for your dependents as when you initially bought your policy?**

- Very concerned  
 Concerned  
 Not concerned  
 I'd like more information on how inflation affects my life insurance benefit.

**Would you like more information on the role that life insurance could play in your estate conservation strategy?**

- Yes       No

**Have you examined your liability exposure?**

- Yes       No

**Do you have other questions or concerns related to planning for your legacy? \_\_\_\_\_**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Your name** \_\_\_\_\_

**Phone number** \_\_\_\_\_

**Email** \_\_\_\_\_

The cost and availability of life insurance depend on factors such as age, health, and the type and amount of insurance purchased. Before implementing a strategy involving life insurance, it would be prudent to make sure that you are insurable. As with most financial decisions, there are expenses associated with the purchase of life insurance. Policies commonly have mortality and expense charges. In addition, if a policy is surrendered prematurely, there may be surrender charges and income tax implications.

The use of trusts involves a complex web of tax rules and regulations. You should consider the counsel of an experienced estate planning professional and your legal and tax advisors before implementing such strategies.

**Thank you for taking the time to complete this survey.**

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