

Concerns Assessment

Please rate the following concerns with 1 being the lowest and 10 being the highest.

On a scale of 1-10 I am concerned about:

How to access and pay for care if I need it.	
Running out of money if I become ill and require significant care.	
Having no control over who provides care for me if I need it.	
Choosing the type of care I want and where I want to receive it.	
Leaving an inheritance to my loved ones, only to have it taken by a creditor.	
My children misusing the property or money I leave to them.	
Providing support to a loved one with a disability during my lifetime and after my death.	
Making sure my wishes about care and finances are carried out.	
Taking advantage of tax breaks where possible.	
Keeping the home in the family.	
Reducing the risk of conflict among family members.	
Treating each child/loved one equally.	

Name: _____

Email: _____

Phone #: _____

P.O.A.? Yes No

Wish to be contacted?: Yes No

P.O.A. Name: _____

Is a Long-Term Care Asset Protection Plan Right for Me?

Do you have concerns about:

- Running out of money if you (or your spouse) become ill and require significant care
- Having no control over who provides care for you if you need it
- Choosing the type of care you want and where you want to receive it
- Leaving an inheritance to your loved ones, only to have it taken by their creditors
- Your children misusing the property or money you leave to them
- Providing support to a loved one with a disability both during your lifetime and after your passing
- Making sure your wishes about care and your finances are carried out

If you answered yes to any of the questions above, we can help. A long-term care asset protection plan is not a one-size-fits-all set of documents. Each plan is designed based on your concerns, your desires, and your goals.