

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 an 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, 401K, 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 Tonkon Torp 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.