Appendix 4

	LEGAL CHECK-UP QUESTIONS	YES	NO
1.	Do you have a will that has been revised within the past 3 years?		
2.	Are there any estate planning changes that should be considered?		
3.	Is your contract of employment, partnership (PC, etc.) agreement both current and adequate for your current needs?		
4.	Are you adequately covered by policies of life, vehicle, liability (both personal and professional) disability, umbrella, and other insurance?		
5.	Do you have any financial or liability exposures that are insurable but presently uninsured (e.g., disability insurance, umbrella policy)?		
6.	Have the liability policy limits changed within the past three years?		
7.	Are there any potential claims that could be asserted against you?		
8.	Do you presently have a written and current listing of all important future dates, such as expiration, option, maturity and due dates?		
9.	Have you within the past 5 years checked whether the Social Security Administration has properly accounted for your future benefits?		
10.	Do you have a file, stored in a secure and fireproof location, containing all important documents (wills, securities, contracts, Marriage/divorce papers, deeds, pension/profit sharing plans etc.)?		
11.	Have you within the past 3 years reviewed the beneficiary designation on all documents that require such information?		
12.	Do you have a complete and current personal financial statement that lists in detail all of your personal assets and liabilities?		
13.	Do you have a complete and current inventory of all of your physical possessions, sufficient to support a claim in the event of a loss?		
14.	To the extent the foregoing questions are relevant to your spouse (if any) and minor children (if any) are there any matters or issues that should be updated, reconsidered or changed?		
15.	To the extent there are persons other than spouse or children for whom you may have some responsibilities (e.g., aging parents) are there items or issues which should be updated or changed?		