

Do I Need an Estate Plan?

Name _____

Date _____

Email _____

Contact # _____

- Do You have a Trust? Paper or Digital?

- Do you know the risks of using joint tenancy?

YES NO

Do you have a Healthcare and Financial Durable Power of Attorney?

YES NO

- Would you like a free 60 min consultation?

YES NO

- Would you like to avoid Probate?

YES NO

- Would you like to protect your work against a Lawsuit or Divorce?

YES NO

- I prefer to be reached by phone or email. Circle choice(s)

_____ Days/times available

- Would you like to lower income, estate, inheritance, retirement, SS taxes?

YES NO

Rowena Kuo _____
224-339-4159
ro@rowenakuo.com



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