

# Personal Legal Health Checklist

If you answer “no” to any of the questions below, please give us a call and we can help.

## The team at JMJ Lawyers

### Do I Have:

#### A Will?

- Are the trustees/guardians still the right people? Yes  No  N/A
- Should I change who receives what? Yes  No  N/A
- Have I covered burial/cremation/where? Yes  No  N/A
- Are my children adults now? Yes  No  N/A
- Have I forgiven all the debts I need to? Yes  No  N/A
- Do I deal with my family trust in my will? Yes  No  N/A

#### Enduring Powers of Attorney?

- Are the attorneys still appropriate? Yes  No  N/A
- Should I have alternative attorneys? Yes  No  N/A
- Do I have both types – property and personal care? Yes  No  N/A
- Who knows that I have one? Yes  No  N/A

#### My Assets protected?

- Do I need a trust? Yes  No  N/A
- Are the trustees still appropriate? Yes  No  N/A
- Can I put more into the trust? Yes  No  N/A
- Do I have regular trust minutes/records? Yes  No  N/A
- Are my assets adequately insured? Yes  No  N/A
- Am I adequately insured? Yes  No  N/A

#### My liabilities minimised?

- Loans and mortgages being paid fast enough? Yes  No  N/A
- If nothing is owing, is the mortgage taken off my land title? Yes  No  N/A
- Regularly review and if possible, release all personal guarantees? Yes  No  N/A
- Considered debt consolidation? Yes  No  N/A

A personal budget?

Yes  No  N/A

**Employment issues covered?**

A current Employment Agreement?

Yes  No  N/A

Current role description?

Yes  No  N/A

Regular reviews with my employer?

Yes  No  N/A

**My Business sorted?**

Have I completed the JMJ Lawyers Business Legal Health Checklist?

Yes  No  N/A

If you have completed your checklist online, let us know your contact details below and press SEND, one of our team will be in touch to talk through your questions with you.

***Contact Details:***

***Name:***

***Email:***

***Phone:***