



## **501: Decision Time** **Study Guide**

- 1.) As you do your planning or think about your plan, what is the hardest issue to decide?
- 2.) How did you eventually decide how to handle that issue?
- 3.) When you did plan in the past or are thinking about it in the future, what motivated you to get a plan in place?
- 4.) If you are married, is one of you pushing more to get the plan done and the other possibly dragging their feet more?
  - a. Why do you think that is?
  - b. What can be done to resolve that and get things done?
- 5.) If you have not gotten to level 10 and finished with signed documents, what is holding you back from getting things signed? Make a list if needed.
- 6.) Do you feel comfortable with the advice you receive from your financial advisor?
- 7.) Do you feel comfortable with the advice you receive from your attorney? (in regard to farm continuation planning)?
- 8.) Would you refer to the plan you have in place a “next step” or “final step”?
- 9.) Have you ever bought something where you have buyer’s remorse? Did that affect your decision making with finalizing your estate plan?
- 10.) If you don’t have a plan in place or need to update your current plan, what is the one thing holding you back?