



Your Money, Your Life

Student Initials: _____

Class Pre Evaluation

Date: _____

Location: _____

Please circle your answer to each of the following statements.

1. A will describes how a deceased person's assets will be distributed to heirs. True False
2. A medical power of attorney allows a deceased person's designated representative to sue a medical professional for damages if the medical professional was negligent in providing care to the deceased person. True False
3. A durable power of attorney is used to appoint a guardian over minor children in the event that a caregiver dies. True False
4. If a person dies without a will, estate taxes must be paid. True False
5. Estate planning is a process designed to help a person manage and preserve his/her assets while alive, and to control the distribution of the assets after his/her death. True False
6. Good records should be kept of past tax returns, insurance policies, bank statements, loan contracts, wills, and employment contracts. True False
7. Estate planning depends on how old a person is, if they are married, and the kind of assets they own. True False
8. A will allows you to designate a person as your executor to act as your legal representation after your death. True False
9. If a young and single person does not need to have a will. True False
10. A trust is a legal entity that holds assets for a beneficiary. This can include cash, stocks, bonds, insurance policies, property, and artwork. True False

Please circle the number that best describes your confidence to do the following:

Your Confidence to:	Not Confident	A little Confident	Somewhat Confident	Confident	Very Confident
1. Periodically discuss your end of life wishes with loved ones and make sure your living will reflects your wishes.	1	2	3	4	5
2. Periodically remind others about the location of important end of life planning documents.	1	2	3	4	5
3. Update your will and beneficiary designations as family situations change.	1	2	3	4	5
4. Create a will with the help of an attorney or "kit".	1	2	3	4	5
5. Creating a living will, in case you may become incapacitated during a medical procedure.	1	2	3	4	5

*Thank you for completing this evaluation.
We appreciate your help as we strive to improve our educational programs.*



Your Money, Your Life

Student Initials: _____

Class Post Evaluation

Date: _____

Location: _____

Please rate the instructor(s), materials, and the overall program by circling the appropriate number.

	Not Helpful	Somewhat Helpful	Helpful	Very Helpful
Instructor(s)	1	2	3	4
Educational Materials	1	2	3	4
Overall Program	1	2	3	4

How could this program be improved?

Please circle your answer to each of the following statements.

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9. If a young and single person does not need to have a will. True False
10. A trust is a legal entity that holds assets for a beneficiary; this can include cash, stocks, bonds, insurance policies, property, and artwork. True False

Please circle the number that best describes your answer.

As a result of this program, do you plan to:	No	Maybe	Yes	Already doing this	Does not apply
1. Periodically discuss your end of life wishes with loved ones and make sure your living will reflects your wishes.	1	2	3	4	5
2. Periodically remind others about the location of important end of life planning documents.	1	2	3	4	5
3. Update your will and beneficiary designations as family situations change.	1	2	3	4	5
4. Create a will with the help of an attorney or "kit".	1	2	3	4	5
5. Creating a living will, in case you may become incapacitated during a medical procedure.	1	2	3	4	5

*Thank you for completing this evaluation.
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Your Money, Your Life

Program Information Sheet

Program Date(s): _____
Instructor(s): _____
Instructor(s) Contact Info: _____
Program Location: _____
Number of Participants: _____

Topics covered during the workshop (check all that apply):

- | | |
|-----------------------------|---|
| 1. Consumer Decision Making | 7. Retirement and Estate Planning |
| 2. Budgeting | 8. Consumer Protection and Identity Theft |
| 3. Cash Flow Management | 9. Risk Management and Insurance |
| 4. Savings and Investments | 10. Taxation |
| 5. Debt Management | 11. Other _____ |
| 6. Homeownership | 12. Other _____ |

Profile of participants (check all that apply):

- | | |
|----------------------------------|----------------------------|
| 1. General Public | 7. Elderly |
| 2. Low-to-moderate income | 8. Military |
| 3. Moderate-to-upper income | 9. Financial Professionals |
| 4. Children and Youth | 10. Teachers/Educators |
| 5. Young adults/College students | 11. Other _____ |
| 6. Babyboomers | 12. Other _____ |

What delivery methods do you use? (check all that apply):

- | | |
|------------------------------------|-------------------------------------|
| 1. Workshop/Seminar | 5. Printed materials |
| 2. Multi-session course | 6. Electronic materials such as CDs |
| 3. One-on-one financial counseling | 7. Long-distance education |
| 4. Internet | 8. Other _____ |

Estate Planning Evaluation Knowledge Questions Answer Key

1. A will describes how a deceased person's assets will be distributed to heirs. **Answer: True. One function of a will is to direct the probate court in distributing the assets of an individual.**
2. A medical power of attorney allows a deceased person's designated representative to sue a medical professional for damages if the medical professional was negligent in providing care to the deceased person. **Answer: False. A medical power of attorney designates someone to make medical decisions on behalf of an incapacitated person.**
3. A durable power of attorney is used to appoint a guardian over minor children in the event that a caregiver dies. **Answer: False. A will is used to appoint a guardian and a durable power of attorney is used to appoint someone to handle a person's financial and other matters if that person becomes incapacitated.**
4. If a person dies without a will, estate taxes must be paid. **Answer: False. Estate taxes are only incurred if the deceased's taxable estate is larger than the lifetime unified credit available to everyone. Wills have nothing to do with whether estate taxes will be owed.**
5. Estate planning is a process designed to help a person manage and preserve his/her assets while alive, and to control the distribution of the assets after his/her death. **Answer: True**
6. Good records should be kept of past tax returns, insurance policies, bank statements, loan contracts, wills, and employment contracts. **Answer: True. Record keeping is an important part of achieving financial goals. Good records are necessary for filing tax returns, disputing charges, or assessing an individual's current financial situation.**
7. Estate planning depends on how old a person is, if they are married, and the kind of assets they own. **Answer: True. The kind of estate planning a person should complete depends on if you own a house, if you are married, or if you have a partner but are not legally married. People with children should have a will, which outlines legal guardianship upon death of a parent.**
8. A will allows you to designate a person as your executor to act as your legal representation after your death. **Answer: True. An executor carries out many estate settlement tasks, including locating your will, collecting your assets, paying legitimate creditor claims, paying taxes on your estate, and distributing any remaining assets.**
9. If a young and single person does not need to have a will. **Answer: False. If you are young and single, you may not need much estate planning, but if you have some material possessions, you should at least write a will, which lets you leave your possessions to anyone you choose.**
10. A trust is a legal entity that holds assets for a beneficiary; this can include cash, stocks, bonds, insurance policies, property, and artwork. **Answer: True. When you create and fund a trust you are known as the grantor. It is the grantor's responsibility to name beneficiaries, or those who will benefit from the trust.**

