

WILL–LIVING WILL–HEALTHCARE P.O.A–IDENTITY THEFT

The following questions are asked so I can better understand your concerns and make an educated recommendation.

TERM EXPLANATION: (Medicare and you book- pages 128, 132)

- **WILL** - Declares who gets your belongings and assets when you die. If you do not have a will, the distribution of your property is left up to the government, and may even end up becoming state property.
- **LIVING WILL** - Outlines specific medical instructions to be applied if you are alive but are unable to communicate your wishes for yourself. (Limited to deathbed concerns only, your wishes if there’s no hope of recovery. Example- DNR)
- **HEALTHCARE POWE OF ATTORNEY** – Empowers a family member or friend to make decisions regarding **healthcare** and **medical** treatment. (Covers all health care decisions, and lasts only as long as you are incapable of making decisions for yourself.)
- **IDENTITY THEFT** - Crime in which an imposter obtains **YOUR** personal information, Medicare or healthcare information, Social Security or credit information in order to steal your identity. **ALSO** most common is corporate breaches, like the recent Anthem/BCBS medical info breach and Walmart credit card information breach.

Do you feel it is important to have a will, living will & medical power of attorney?..... Yes / No

1. Have you discussed a DNR – (do not resuscitate) in the case of a medical emergency? Yes / No
2. If you do not have a will, living will or medical p.o.a., is cost the reason you have not done so? Yes / No
3. If you have a will, when was it last updated? _____ How much would it cost to update? _____
4. Do you have access to a trusted law firm that works with multiple different issues? Yes / No
5. If you were to have a legal issue that required a lawyer, could you afford one at this time? Yes / No
6. Would you like to have access to a Law Firm 24 hours a day to review documents, answer questions you may have, send letters on your behalf and represent you in court if ever required? Yes / No
7. Have you ever been a victim of identity theft? Yes / No Explain: _____
8. Do you have concerns or are you worried about being a victim of identity theft? Yes / No
9. Who would you call if your identity, purse or wallet was stolen to get help? _____
10. Now I have a better understanding about your concerns, let me make a recommendation that can provide you with a peace of mind these issues are taken care of.

<u>LEGAL SHIELD</u>	<u>IDENTITY THEFT</u>	<u>LEGAL SHIELD W/ IDENTITY THEFT</u>
*Primary member	*Primary member	*Primary member
*Spouse	*Spouse	*Spouse
*Children under 21/ college 23	*Children under 21	*Children under 21
Will, Living Will & Healthcare P.O.A. (Updated annually)	Complete credit restoration	**Benefits of Legal Shield
Unlimited Legal Advice	Correct identity theft issues	**Benefits of Identity Theft
Unlimited Letters & calls on your behalf	Triple bureau credit monitoring	
Review Contracts & Documents	Proactively search your credit	
Traffic court violations / DL issues	Proactively search your name	
50 hours of IRS audit assistance	Lost wallet assistance	
300 hours of Trial defense	Provide fraud alerts	
24/7 Emergency Lawyer access	Internet Monitoring	
Online legal forms	Corporation breach protection	
25% Preferred member discount	Corporation breach protection	
<u>\$19.95 Monthly Premium</u>	<u>\$14.95 Monthly Premium</u>	<u>\$29.95 Monthly Premium</u>

Contact us at 630-400-5445

www.theinsuranceadvisor.net

Agent name: _____