

10-Question Financial Rescue Questionnaire

Your true wealth isn't just money. It's your family, your business, and your legacy.

Check if answering yes, then at the bottom, add up your score. ⚠ Every "No" is a hole in your armor. Every "Yes" is one more safeguard for the people counting on you!

☒ Family Protection

- ☐ Do you have a legally updated will or living trust—signed, not "someday"?
- ☐ Has your life insurance been reviewed in the last 12 months for gaps?
- ☐ Would your loved ones instantly know where to find critical documents?

☒ Business Protection

- ☐ If you couldn't work tomorrow, does a continuity plan keep the business alive?
- ☐ Have you and your partners reviewed buy/sell agreements recently?
- ☐ Could your family actually run the business without you—or would it collapse?

☒ Legacy & Preparedness

- ☐ Are accounts, passwords, and policies organized in one secure place?
- ☐ Do you have funds set aside for end-of-life expenses?
- ☐ Have you openly shared your financial wishes beyond "the paperwork"?
- ☐ Is your household protected by more than one income stream?

Your Score

Give yourself **1 point for every Yes.**

- **8–10 points = Legacy Leader**

👉 You're in rare company. Keep building your plan.

- **4–7 points = In Progress**

👉 Good start. A little clarity today could save your family tomorrow.

- **0–3 points = Rescue Needed**

👉 Don't panic — most families start here. You're one FRP away from turning this around.

👉 **Ready to protect your family and business? Click below to book your Financial Rescue Session.**

Go Beyond Tomorrow – 10061 Talbert Avenue #315, Fountain Valley, CA 92708
714-658-8998 Lori@financialrescueplan.com www.GoBeyondTomorrow.com