

Transferring Cherished Possessions

FOLLOW-UP PROGRAM EVALUATION

INDICATE WHICH SESSIONS YOU ATTENDED:

- Lesson 1: Where Do I Start?
- Lesson 2: What is Fair?
- Lesson 3: Who Gets What?
- Lesson 4: How Can We Communicate Without Conflict?

LEVEL OF UNDERSTANDING

For each of the topics listed below, in the middle column, circle the number that best reflects your Level of Understanding **BEFORE** the program. Then, in the righthand column, circle the number that best reflects your Level of Understanding **AFTER** the program.

Poor = 1, Average = 2, Good = 3, Excellent = 4

Level of Understanding or Ability	BEFORE the Program	AFTER the Program
How to start estate planning for non-titled possessions.	1 2 3 4	1 2 3 4
How to consider "fairness" when making a plan to distribute my assets.	1 2 3 4	1 2 3 4
Different ways to distribute my cherished and non-cherished possessions.	1 2 3 4	1 2 3 4
How to clearly communicate my estate plans and goals with loved ones.	1 2 3 4	1 2 3 4

BEHAVIOR CHANGES

Indicate whether or not you have completed any of the following tasks since the *Transferring Cherished Possessions* program ended.

Behavior Change	Yes	I have started the task but have not completed it.	No
I have written an Asset Distribution Plan.			
I have written a Letter of Last Instructions.			
I have contacted an estate planning professional (e.g., lawyer, financial planner).			
I have created or updated my will.			

YOUR BIGGEST TAKEAWAY

If you have shared your estate plans with someone, with whom have you discussed your plans? (*Examples may include loved ones; professionals such as an attorney, estate planner, or accountant; your executor; etc.*)

THE MOST SIGNIFICANT THING

What is the most significant thing(s) from this program you have or will apply to your life?

THANK YOU FOR YOUR TIME!

You are welcome to offer additional comments on the back of this sheet.

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