



Transferring Cherished Possessions

LESSON 1: WHERE DO I START?

PROGRAM EVALUATION

Please take a moment to provide feedback on the program you have just completed.

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
Understand how to start estate planning for my non-titled possessions	1 2 3 4	1 2 3 4
Evaluate legal considerations for distributing non-titled possessions	1 2 3 4	1 2 3 4
Establish family goals for distributing non-titled possessions	1 2 3 4	1 2 3 4

INTENTIONS

Check whether you plan to change the following behaviors as a result of the program.

Behavior Change	Yes	No
I will write a Letter of Last Instructions.		
I will discuss goals for asset distribution with my loved ones.		

THE MOST SIGNIFICANT THING

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

THANK YOU FOR YOUR TIME!

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