

Who Would Raise Them? The Five Foundations of the Family Shield

with Jim and Beth Hood of Family Shield Estate Planning

The Steward's Audit & Notes

Foundation 1: The Guardian - *Selecting the right people to raise your kids if you cannot*

We have talked seriously as a couple about who would raise our kids if we both died.	___ Yes ___ No ___ Not Sure
We both agree on our top guardian choice and a backup.	___ Yes ___ No ___ Not Sure
We have actually talked to them and received a clear yes.	___ Yes ___ No ___ Not Sure
Our guardianship wishes are written down in signed, state-appropriate documents.	___ Yes ___ No ___ Not Sure

Foundation 2: The Structure - *Protecting your family from chaos, court, and conflict*

We have a will or other estate planning documents in place.	___ Yes ___ No ___ Not Sure
We understand the difference between a will and a revocable living trust.	___ Yes ___ No ___ Not Sure
We have a trust-based plan, or a specific strategic reason why we do not.	___ Yes ___ No ___ Not Sure
Our documents reflect our current kids, the state we currently live in, and our current wishes.	___ Yes ___ No ___ Not Sure

Foundation 3: The Provision - *Ensuring they are provided for without delay*

We know roughly what our family spends each month.	___ Yes ___ No ___ Not Sure
We know how our family would be provided for if one of us died.	___ Yes ___ No ___ Not Sure
We know how our children and their guardian would be provided for if we both died.	___ Yes ___ No ___ Not Sure
Our life insurance coverage and beneficiary designations are up to date.	___ Yes ___ No ___ Not Sure

Foundation 4: The Blueprint - *Leaving behind the specific values and guidance they need*

We have written something down about our faith, values, and hopes for our children. ☐ Yes ☐ No ☐ Not Sure

We have a list of key passwords and accounts that are accessible in an emergency. ☐ Yes ☐ No ☐ Not Sure

We have thought through important traditions, rhythms, and “this really matters to us” notes. ☐ Yes ☐ No ☐ Not Sure

Foundation 5: The Heart - *Shaping their lives, and yours, while you are still here*

We have had age-appropriate conversations with our children about death, heaven, and hope. ☐ Yes ☐ No ☐ Not Sure

We are building simple faith and relationship rhythms we would want them to remember. ☐ Yes ☐ No ☐ Not Sure

We are modeling the character we hope our children will one day possess. ☐ Yes ☐ No ☐ Not Sure

Score Your Family Shield

Total the number of responses in each column: ☐ Yes ☐ No ☐ Not Sure

Your Family Shield Readiness:

13-18 Yes responses: <i>Shielded</i>	7-12 Yes responses: <i>Partially Protected</i>	0-6 Yes responses: <i>Vulnerable</i>
You have taken meaningful steps. Your next step is refinement, review, and closing any remaining gaps.	You have pieces in place, but a partial shield can still fail where your family needs it most.	This is a wake-up call. Important parts of your Family Shield are still unfinished or unclear.

Your Next Step

You identified the gaps. Now learn how to close them.

Join our next free online **Family Shield Workshop**: *How to Move from Good Intentions to a Plan That Protects Your Family*

Bring your audit and your questions for live Q&A.

Live attendees receive the **Conversation Starter Kit**

If you haven't already registered visit:
<https://familyshieldestateplanning.com/workshop/>



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