



FAMILY SHIELD
— ESTATE PLANNING —

The Steward's Audit

The Steward's Audit is a simple self-assessment: 18 questions, Yes, No, or Not Sure. It helps you see what your family already has handled and where there may still be gaps.

If you're married, each spouse should answer separately. Go with your gut, and no peeking at each other's answers. You can compare notes afterward. That conversation is often where the real clarity starts.

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

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

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

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|--|-----------------------------|
| 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’ve seen what’s handled. Now let’s figure out what still needs attention.

The Steward’s Audit is meant to give you clarity—not another overwhelming list of things you’re supposed to do.

If you discovered a few things that have been sitting on the “we really need to do that” list, we can help you figure out what actually matters for your family and what makes sense to do next.

Schedule a Free Family Shield Planning Call

We’ll talk through your family’s situation, answer your questions, and help you identify the practical next steps for getting the important pieces handled.

No pressure, and no need to have everything figured out before we talk.

To schedule with Jim: <https://familyshieldestateplanning.com/calendar/>

Contact us at (870) 877-1040 or jim@familyshieldestateplanning.com

