



# SPECTRUM

## CONTINUITY PLANNING<sup>LTD</sup>

---

### BASIC CONTINUITY CHECKLIST – FOR EVERYBODY

Y or N or NA

1. WHEN I DIE, THE PLANS AND GOALS FOR MY FAMILY'S FUTURE WILL CONTINUE AS IF I WAS STILL HERE. \_\_\_\_\_
2. MY SPOUSE UNDERSTANDS THE PLANS I HAVE MADE IN THE EVENT OF MY DEATH. \_\_\_\_\_
3. WHEN MY SPOUSE DIES OR BECOMES ILL, WE HAVE A PLAN TO ALLOW THE FAMILY TO CONTINUE TO THRIVE AND HAVE ONGOING FINANCIAL SECURITY AND FLEXIBILITY. \_\_\_\_\_
4. IF I AM SICK OR HURT, MY INCOME CONTINUES, AND NO FINANCIAL DISRUPTION OR PANIC WILL OCCUR. \_\_\_\_\_
5. IF I AM UNABLE TO ACT FOR MYSELF, MY SPOUSE AND/OR FRIENDS KNOW HOW TO HELP ME AND WHERE TO FIND WHAT THEY NEED TO HELP ME. \_\_\_\_\_
6. I HAVE AN UP-TO-DATE REPRESENTATION AGREEMENT. \_\_\_\_\_
7. I HAVE AN UP-TO-DATE POWER OF ATTORNEY. \_\_\_\_\_
8. WE HAVE A REP AGREEMENT AND POWER OF ATTORNEY FOR OUR UNMARRIED ADULT CHILDREN. \_\_\_\_\_
9. MY CURRENT WILL REFLECTS MY WISHES ACCURATELY. \_\_\_\_\_
10. I HAVE AN UP-TO-DATE "WHERE IS EVERYTHING" LIST THAT MY SPOUSE AND/OR FRIENDS CAN ACCESS. \_\_\_\_\_
11. IF MY SPOUSE AND I DIE, WE HAVE A PLAN IN PLACE FOR THE GUARDIANSHIP AND FINANCIAL SUPPORT OF OUR CHILDREN. \_\_\_\_\_
12. IF MY SPOUSE AND I BOTH DIE, WE HAVE A PLAN IN PLACE SO THERE IS NO FINANCIAL HARDSHIP FOR THE GUARDIAN OF OUR CHILDREN. \_\_\_\_\_

### FOR THE BUSINESS OWNER

1. WHEN ANY OF MY BUSINESS ASSOCIATES/PARTNERS/KEY EMPLOYEES DIE OR BECOME DISABLED, MY BUSINESS WILL CONTINUE TO OPERATE SEAMLESSLY AND EFFECTIVELY. \_\_\_\_\_
2. THERE IS A WRITTEN PLAN TO UNLOCK THE VALUE OF THE BUSINESS FOR MY FAMILY WHEN I DIE. \_\_\_\_\_
3. IF I OR A BUSINESS PARTNER IS DISABLED, THERE IS A WRITTEN PLAN TO CONTINUE OR DISCONTINUE INCOME AND/OR DIVIDENDS \_\_\_\_\_
4. OR, IF I OR A BUSINESS PARTNER IS DISABLED, THERE IS A PLAN TO DEAL WITH THE STRUCTURE OF THE BUSINESS \_\_\_\_\_