



AIA Trust Equitable Webinar Estate Planning 101

Thank you for viewing the AIA Trust webinar on smart estate planning presented by Stephen B. Dunbar III, JD, Director of Diversity & Inclusion, Executive VP, Equitable Advisors. We hope you found it informative and useful. Please answer the following 10 questions and email to aiatrust@aia.org to receive 1 AIA CE credit which will be added to your online transcript.

- 1) Importance of estate planning includes all the following except
 - a. Controlling the distribution of your assets
 - b. Leaving decisions to the last minute
 - c. Protecting your family members

- 2) Estate Planning can help in avoiding conflict between family members
 - a. True
 - b. False

- 3) It's a good idea to keep digital assets and passwords for all important devices and websites, including those where you handle finances, email, and social media in a secure location that is known by close family members
 - a. True
 - b. False

- 4) Liabilities such as mortgages, loans such as home equity loans, lines of credit and student loans, and any borrowed items should not be included in your estate planning documents
 - a. True
 - b. False

- 5) Although also important, the medical power of attorney isn't typically part of estate planning documents
 - a. True
 - b. False

- 6) A will won't typically affect the length of the probate process
- a. True
 - b. False
- 7) A written statement expressing your desires regarding medical treatment if you are no longer able to express informed consent is an example of a
- a. Medical power of attorney
 - b. Durable power of attorney
 - c. Living will
- 8) A will can help guarantee that your wishes regarding your estate are carried out and minimize familial conflict
- a. True
 - b. False
- 9) Credit Cards become void after someone dies, so they do not need to be included in your financial information and assets
- a. True
 - b. False
- 10) Estate planning is not an important consideration until age 55 to 65
- a. True
 - b. False