



Hester Insurance does not offer the same insurance coverage to every client, because every client is different. Protecting what is important to you is important to us, but in order to do so, we need to know more about you, your needs, and your dreams. Please complete the questionnaire according to your life right now to better enable us to identify what is important to you. You are more than the articles you insure through the agency!

I am concerned about:

Level of concern: None Little Some A Lot Unsure

- Protecting my assets
Having adequate coverage if sued
Having the right coverage if there is a claim
Managing health care expenses
Planning for Long Term Care
Becoming Disabled
My Family, should I die
Leaving a legacy for those I love
Other:

Do you have the following documents in place?

Yes No Unknown

- Last Will and Testament
Trust
Power of Attorney
Healthcare Directive
Healthcare Power of Attorney
Living Will
HIPAA Release

If you currently work with the following professionals, please provide me with their name, or if you would like a referral to someone with experience in the listed field, please let us know.

Refer Me No Thanks I use...

- Financial Advisor
Accountant or Bookkeeper
Legal Advisor

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