

# Estate Tax & Probate Exposure Self-Assessment

Self-Assessment Worksheet — ClearLegalTips.com (2026)

## INSTRUCTIONS FOR USE

This quick self-check flags whether your estate may face estate tax or a costly probate. It's a starting point, not tax/legal advice.

## Part 1 — Tick What Applies

Tick each statement that applies to you:

- ☐ My total estate is over \$1 million
- ☐ I own real estate
- ☐ I own property in more than one state
- ☐ I own a business
- ☐ I have no will or trust
- ☐ I live in a state with its own estate or inheritance tax
- ☐ My beneficiary designations are out of date
- ☐ I have minor children with no named guardian

## What Your Answers Mean

0–2 boxes: Lower exposure — keep your will and beneficiaries current.

3–4 boxes: Moderate — consider a living trust and a beneficiary review.

5+ boxes: Higher exposure — talk to an estate attorney about a trust and tax planning.

## Notes

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This resource is provided by ClearLegalTips.com for general informational purposes only and does not constitute legal advice. Laws vary by state and change over time. Consult a licensed attorney for advice specific to your situation.