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ESTATE PLAN SUCCESS CHECK-UP CHECKLIST

When was the last time you had personal Estate Plan “check-up?” Is your Estate Plan ready for when you need it? If your Estate Plan was completed 3 years ago or more, it is time for an Estate Plan “check-up.”

The following questions are designed to help you self-assess if your Plan works in the case of incapacity, protecting your loved ones, and passing on your family legacy.

Please review each question regarding your current Estate Plan. Check “Yes” or “No” or “Don’t Know” for your answer	Yes	No	Don’t Know
1. Do you have a <i>complete</i> (i.e., comprehensive) Estate Plan that includes everything listed below? <ul style="list-style-type: none"> ○ Last Will and/or Trust • Financial Power of Attorney • Healthcare Power of Attorney ○ Living Will or Advance Directive • HIPAA Authorization • Personal Property Assignment • Final Memorial Instructions ○ Fully Funded Living Trust 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has your Estate Plan been reviewed with a professional over the last three (3) years for accuracy of your wishes, compliance with tax laws changes, properly titled assets, or any other changes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Does your Estate Plan include a process to determine your capacity and when how others are empowered to make emergency financial and healthcare decisions for you?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Does your Estate Plan give provide clear instructions for your care and the care of your loved ones once you’re incapacitated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please review each question regarding your current Estate Plan. Check “Yes” or “No” or “Don’t Know” for your answer	Yes	No	Don’t Know
5. If you have a Living Trust Estate Plan, have you confirmed that your assets are appropriately titled into the name of your Living Trust so your family avoids the emotional trauma, administrative delays and expenses of a guardianship or probate process?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Have you recently confirmed that the beneficiary designations on your life insurance policies, bank accounts and retirement plans track with the terms of your Estate Plan distribution pattern?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does your current Estate Plan provide predator and creditor protection and remarriage protection for your <u>surviving spouse</u> ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. If you have <u>minor</u> children or children with <u>special medical needs</u> , does your Estate Plan thoroughly address these issues and needs?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does your current Estate Plan provide <u>predator, creditor, lawsuit, and divorce protection</u> for your children or other beneficiaries?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does your Estate Plan include provision to avoid <u>Will / Trust contests and disputes</u> after your death and during the administration of your Estate?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Does your Estate Plan include current <u>tax prevention language</u> that reduces you paying unnecessary state and federal taxes?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Have you <u>shared</u> your Estate Plan with your family members; do they know how to <u>locate</u> your original Estate Plan documents in the event of an emergency?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Have you <u>notified</u> the persons you want to serve as your Executor, Power of Attorney agents and Successor Trustee, and are they <u>prepared to act</u> on your behalf when needed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Have you had any significant <u>life events</u> in the last 3-5 years, i.e., births, deaths, divorces, new purchases, lawsuits, losses, wins or windfalls, etc.?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Have any of the above questions triggered any <u>other questions, concerns, or issues</u> that you feel should be addressed in your Estate Plan?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Hopefully, the above checklist helped give you peace of mind that your Estate Plan will be a long-term success. However, if your answer to **any** of the questions was “**No**” or “**Don’t Know**”, then this is a strong indication that your Estate Plan needs to be reviewed and updated to assure it works when you need it the most. We wish you and your family success!