

FREE RESOURCE · SELF CHECK-UP

Estate Planning Self Check-Up

An estate plan is a powerful tool for ensuring that you and your loved ones are protected if you become incapacitated (unable to manage your affairs) or after you pass away. But creating one is not a one-and-done task. Use this checklist to ensure that your plan is complete and still reflects your wishes.

NAME

DATE

01 CHANGES IN YOUR LIFE	YES	NO
Have you experienced any major life events, such as marriage, divorce, birth of a child or grandchild, retirement, receipt of an inheritance, or the death of a loved one?	☐	☐
Has your health changed significantly since you last reviewed your estate plan?	☐	☐
Has your financial situation changed significantly since you last reviewed your estate plan?	☐	☐
Has your place of residence changed since you last reviewed your estate plan?	☐	☐

02 YOUR DOCUMENTS	YES	NO
Can you find your estate planning documents? If not, call us and we can send you copies or discuss whether you need to sign a new set of originals.	☐	☐
Are your documents easily accessible to you and your loved ones? Let your personal representative/executor, successor trustee, and agents under your powers of attorney know where your estate planning documents are located, and ensure that they have what they need to access them.	☐	☐
If you have electronic copies of your documents, are they stored in a secure electronic format (e.g., cloud-based storage or an encrypted flash drive), and do your trusted loved ones know how to access them if needed?	☐	☐

03 IMPORTANT ROLES IN YOUR ESTATE PLAN	YES	NO
Who is listed as the personal representative/executor in your will or pour-over will? Is this person currently able to wind up your affairs if you were to pass away? Did you name a backup?	☐	☐
Who is listed as the successor trustee of your revocable living trust? Is this person currently available to manage your trust if you cannot? Did you name a backup? Remember, a successor trustee can step in if you are unable to act as trustee, even during your lifetime.	☐	☐
Whom did you nominate as the guardian for your minor child(ren)? Did you name a backup? If something were to happen to you tomorrow, can this person come and take care of your child(ren)?	☐	☐

CONTINUED ON PAGE 2 —

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03 IMPORTANT ROLES (CONT.)

YES

NO

Who is listed as the agent under your **healthcare or medical power of attorney**? If something were to happen to you tomorrow, would this person be able to meet you at the hospital within a reasonable amount of time to convey your medical wishes? Did you name a backup? Have you communicated your medical wishes to your agent, and do you trust that they will honor them?

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Who is listed as the agent under your **financial power of attorney**? Is this individual able to act on your behalf (write checks, pay bills, etc.) right now if you need them to? Did you name a backup? When did you sign it? The older the document, the more likely your agents may encounter resistance from banks and other financial institutions.

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Have you informed your chosen decision-makers that they have a role in your estate plan? If not, now is the perfect time to touch base, so that you can make any necessary changes if they are not willing or able to act.

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04 DISTRIBUTIONS AT YOUR DEATH

YES

NO

Are you still comfortable with the beneficiaries named in your estate plan and the amounts or percentages designated for each? Has anything changed with them (marriage, divorce, birth or adoption of a child, creditor or legal issues, health issues, substance abuse, etc.) that would make you want to adjust how much or when they inherit?

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Would you like to consider adding any charitable organizations as beneficiaries — or, if you already have, do those charities still reflect your values and goals?

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Your will or trust likely states the manner and time at which your beneficiaries will receive an inheritance. Are those distribution plans still appropriate given your beneficiaries' ages, maturity levels, and current personal and financial situations?

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☐

Have any of your named beneficiaries already passed away? Are backup beneficiaries named in your will or trust, and do they reflect your current wishes?

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☐

05 TRUST FUNDING

YES

NO

Have you acquired new real estate, bank or investment accounts, or other valuable property since your trust was signed?

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Is your trust properly funded? Based on our recommendations, you have either (i) transferred ownership of each account and piece of property into the trust, or (ii) named the trust as the beneficiary.

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Something needs attention?

If you cannot find your documents, have questions, or realize something in your plan may need to be updated, please give us a call. We are here to help.

Everything in order?

Set this checklist aside and move forward with peace of mind, knowing your documents should protect you and your loved ones if something were to happen.

NOTES & QUESTIONS FOR YOUR REVIEW

SCHEDULE YOUR REVIEW

Bring this checklist to your next meeting.

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