

Estate Planning Checklist: Quick Look

Is Your Estate Plan Up-To-Date?

You should review your estate plan on a regular basis. Use the provided checklist to help keep yourself up-to-date and on track with your estate planning. Answer each question with either “Yes” or “No” and mark when the item was last updated. You should meet with a wealth manager or estate planner to discuss your results.

| Does Your Estate Plan: | Yes | No* | Updated |
|--|-----|-----|---------|
| Include an organized list of financial accounts, valuable documents and trusted advisors? | | | / |
| Include an up-to-date Will? | | | / |
| Include a living will? | | | / |
| Name a guardian for your minor children? | | | / |
| Name an executor (or personal representative) and trustee you are confident will carry out your wishes? | | | / |
| Take into consideration any special medical or educational needs certain family members may have? | | | / |
| Take into consideration any special medical or educational needs certain family members may have? | | | / |
| Take advantage of the benefits of lifetime gifts? | | | / |
| Include charitable gifts? | | | / |
| Provide investment assistance for family members who may need help managing their inheritances? | | | / |
| Take into consideration current tax code? | | | / |
| Provide for a thought out transfer of your business interested at your retirement, death, or if you become disabled? | | | / |
| Consider funeral planning? | | | / |
| Have you properly titled assets? | | | / |
| Have you properly named beneficiaries? | | | / |
| Have you properly segregated asset among family members? | | | / |

| Protecting Your Estate: Have you considered a(n)... | Yes | No* | Updated |
|---|-----|-----|---------|
| Umbrella Policy? | | | / |
| Long Term Care Policy? | | | / |
| Life Insurance? | | | / |
| Life Insurance Trust? | | | / |

*Every “No” answer may indicate a gap in your estate planning.