



“LIVING WITH YOUR BAGS PACKED!®”

Estate Planning Deficiencies Check-Up

CHECK-UP QUESTIONS

CIRCLE ONE

1. Do you have a Will or a Trust in place?

Without proactive planning, state laws will determine how your assets pass, to whom they pass, and when they pass. This can lead to undesired results, and is perhaps the most costly way to pass assets to loved ones.

Yes No Do not know/ Not sure

2. Has your Will or Trust been reviewed in the last two years?

Even assuming that there have been no family or financial changes since your plan was last reviewed, there have been several major tax law changes. An out-of-date estate plan can be worse than no planning at all.

Yes No Do not know/ Not sure

3. Has your Will or Trust been reviewed in the last two years?

Even assuming that there have been no family or financial changes since your plan was last reviewed, there have been several major tax law changes. An out-of-date estate plan can be worse than no planning at all.

Yes No Do not know/ Not sure

4. Does your current Health Care Power of Attorney permit the person of your choosing (spouse, child, family) to make emergency health care decisions for you in the event you are unable to do so?

Yes No Do not know/ Not sure

5. Does your estate plan contain a customized plan to determine if you are mentally disabled?

Yes No Do not know/ Not sure

6. Does your current estate plan give instructions for your care and the care of your loved ones in the event of disability?

Yes No Do not know/ Not sure

7. Are you certain that your current estate plan will minimize possible federal estate taxes at your death, including taxes on your house, life insurance and IRA's?

Yes No Do not know/ Not sure

8. If you have a Revocable Living Trust in place as part of your estate plan, is your trust fully funded so that your family can avoid the delays and expenses of probate?

Yes No Do not know/ Not sure

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| 9. Have you taken steps to avoid possible Will contests and disputes during the administration of your estate? | Yes | No | Do not know/
Not sure |
| 10. Does your estate plan protect your children’s inheritance in the event your surviving spouse chooses to remarry? | Yes | No | Do not know/
Not sure |
| 11. Have you recently checked the beneficiary designations of your retirement plans and life insurance policies, and are you confident that you have not listed your estate or any minor children as either primary or secondary beneficiaries? | Yes | No | Do not know/
Not sure |
| 12. Does your current estate plan provide creditor and lawsuit protection for assets passed to your surviving spouse? | Yes | No | Do not know/
Not sure |
| 13. Does your current estate plan provide creditor and lawsuit protection for assets passed to your children’s inheritance? | Yes | No | Do not know/
Not sure |
| 14. Are you confident that your current estate plan is income tax efficient? | Yes | No | Do not know/
Not sure |
| 15. Does your current plan protect your children’s inheritance from a divorcing spouse? | Yes | No | Do not know/
Not sure |
| 16. Are you satisfied with the persons you named as guardians of your minor children in your current plan? | Yes | No | Do not know/
Not sure |
| 17. Are you satisfied with the persons selected as personal representative and trustee in your current estate plan? | Yes | No | Do not know/
Not sure |
| 18. Are you confident that your personal representative, agent, and successor trustee are prepared to act on your behalf when asked to? | Yes | No | Do not know/
Not sure |

If you answered No or Do not know/No sure to any of the questions, either contact your own attorney for an estate planning consultation or [click here](#) to schedule your free Discovery Session.