

Estate Planning Deficiencies Check-Up

Circle One

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 Don't Know

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 An out-of-date estate plan can be worse than no planning at all.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 Don't Know

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 Don't Know

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

Yes No Don't Know

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

Yes No Don't Know

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 Don't Know

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 Don't Know

Have you taken steps to avoid possible will contests and disputes during the administration of your estate?

Yes No Don't Know

Does your estate plan protect your children's inheritance in the event your surviving spouse chooses to remarry?

Yes No Don't Know

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Estate Planning

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Circle One

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 Don't Know

Does your current estate plan provide creditor and lawsuit protection for assets passed to your surviving spouse?

Yes No Don't Know

Does your current estate plan provide creditor and lawsuit protection for assets passed to your children's inheritance?

Yes No Don't Know

Are you confident that your current estate plan is income tax efficient?

Yes No Don't Know

Does your current plan protect your children's inheritance from a divorcing spouse?

Yes No Don't Know

Are you satisfied with the persons you named as guardians of your minor children in your current plan?

Yes No Don't Know

Are you satisfied with the persons selected as executor and trustee in your current estate plan?

Yes No Don't Know

Are you confident that your executor, power of attorney, and successor trustee are prepared to act on your behalf when asked to?

Yes No Don't Know

If you answered No or Don't Know to any of the questions, you can sign up for a no cost, no obligation estate planning consultation. Complete the bottom of this form and we will contact you to schedule the complimentary consultation.

Client Name: _____

Date: _____

Email Address: _____

Phone: _____

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