

Estate Plan Review Checklist



The health of your estate plan is important and deserves periodic reviews to ensure it is current with the law and your circumstances. This checklist is designed to help you and your advisors quickly assess some vital planning aspects. Consider contacting your professional advisors for a review of your plan.

Questions	Yes	No	Unsure
Do you have an executed estate plan?			
Have you and your estate planning attorney recently reviewed your estate planning documents?			
Is your plan consistent with your current goals and your family, medical, and financial circumstances?			
Do you have documents in place to ensure your wishes will be carried out and loved ones will be cared for in the event you are unable to handle your affairs during your lifetime, or in the event of your death?			
Are your named guardians, attorneys-in-fact, executors, trustees and their successors appropriate, willing, and able to act in their designated role? Are there checks and balances where appropriate?			
Have you considered including a trust in your estate plan?			
If you executed a living trust, was it funded appropriately?			
Do you know the manner in which legal title to all your assets is held?			
Do your assets that pass outside your will pass to the appropriate beneficiaries?			
Do you have life, disability, and long-term care insurance? If so, are the insurance attributes and beneficiary designations consistent with your goals?			
Do you have other assets with special attributes? If so, does your plan adequately account for such assets?			
Do you have a succession plan for your business or at your workplace?			
Have tax laws and/or other laws significantly changed since you last executed your estate plan?			
Does your plan adequately consider income taxes, estate taxes, marital deduction planning, and the opportunity for your surviving spouse to use your unused estate tax exemption?			
Does your plan contemplate charitable planning?			
Do you have peace of mind with your estate plan?			

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