

Estate Plan Review Checklist

- **Are the documents signed with witnesses/notary?**
 - If so, do you have an unaltered copy of the signed documents?
 - Do you have an original?
 - If not, do you know who has the original signed documents?
- **Are the agents named, Executor, Trustee, Powers of Attorney, still accurate?**
 - Are children or beneficiaries now able to serve as an agent?
- **Are the beneficiaries named still accurate?**
 - Do the standards for distribution need to be updated to meet your goals?
- **Are you over the age of 50 and have a concern about long-term care and nursing home costs?**
 - If so, you might need to evaluate asset protection planning techniques.
- **Are you single with at least \$4 million in net worth, including life insurance proceeds, or married with at least \$8 million in net worth?**
 - If so, you might need to evaluate estate tax planning techniques.
- **Do you have a Trust?**
 - If so, do you know if assets were re-titled to the Trust or if a beneficiary designated the Trust?
- **Do any of your children or beneficiaries have potential personal liability, for example, doctors, lawyers, accountants, financial advisors, architects, business owners, etc.?**
 - If so, you might want to add asset protection provisions for those beneficiaries.
- **Are you concerned children or beneficiaries might get divorced or become disabled or incapacitated after your death?**
 - If so, you might want to add asset protection provisions, and a supplement needs provision.
- **If you created a Trust, was the most recent version signed before the year 2020?**
 - If so, and if you have retirement assets passing through your Trust, you might need to update the Trust to account for the Secure Act.