

IS YOUR ESTATE PLAN OUTDATED?

1. Has it been more than 3 years since you reviewed your current estate plan?
2. If you have minor children, does your estate plan name Guardians for them?
3. Since creating your estate plan, are your children now adults?
4. If you have a Trust, are there any assets that you have not transferred into your Trust?
5. If you become disabled, is your Power of Attorney document for financial decisions older than 5 years?
6. If you become disabled, is your Power of Attorney document for health care decisions older than 5 years?
7. Are there any gifts you would like to make to charities at your death that have not been clearly set forth in your planning documents?
8. Is there any personal property that you would like distributed that has not been clearly set forth in your planning documents including care of any surviving pets?
9. Since you signed your planning documents, have you changed your mind about any aspect of the plan?
10. Has the value of your assets changed since you signed your planning documents?