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## **ESTATE PLANNING SELF CHECK-UP**

An estate plan is a powerful tool for ensuring that you and your loved ones are protected if you become incapacitated (unable to manage your own affairs) or after you pass away. However, creating an estate plan is not a one-and-done task!

Use this checklist to ensure that your plan is complete and accurate and still reflects your wishes. After going through this checklist and reviewing your own estate plan, if everything is in order, you can move forward with peace of mind. And you will know that your estate planning documents should protect you and your loved ones if something were to happen to you. However, if everything is NOT in order, don't put off making the necessary adjustments!

**JB Hilliard, Esq.**  
**The Law Office of JB Hilliard, LLC**



## ESTATE PLANNING SELF CHECK-UP

Name: \_\_\_\_\_

Date: \_\_\_\_\_

<b>CHANGES IN YOUR LIFE</b>	<b>YES</b>	<b>NO</b>
Have you experienced any major life events, such as marriage, divorce, birth or adoption of a child or grandchild, retirement, receipt of an inheritance, or the death of a loved one?	<input type="checkbox"/>	<input type="checkbox"/>
Has your health changed significantly since you last reviewed your estate plan?	<input type="checkbox"/>	<input type="checkbox"/>
Has your financial situation changed significantly since you last reviewed your estate plan?	<input type="checkbox"/>	<input type="checkbox"/>
Has your place of residence changed since you last reviewed your estate plan?	<input type="checkbox"/>	<input type="checkbox"/>

<b>YOUR DOCUMENTS</b>	<b>YES</b>	<b>NO</b>
Can you find your ORIGINAL estate planning documents?	<input type="checkbox"/>	<input type="checkbox"/>
Are your documents easily accessible to you and your loved ones?	<input type="checkbox"/>	<input type="checkbox"/>
Does your Executor/Trustee/Agent/Personal Representative know where your ORIGINAL documents are?	<input type="checkbox"/>	<input type="checkbox"/>
If you have electronic copies of your documents, are they stored in a secure format (e.g., cloud-based storage system or encrypted flash drive)?	<input type="checkbox"/>	<input type="checkbox"/>
Do your trusted loved ones know how to access them if needed?	<input type="checkbox"/>	<input type="checkbox"/>



**ESTATE PLANNING SELF CHECK-UP**

<b>IMPORTANT ROLES IN YOUR ESTATE PLAN</b>	<b>YES</b>	<b>NO</b>
Is the person you've listed as your Executor/Personal Representative in your Will currently able to wind up your affairs if you were to pass away?	<input type="checkbox"/>	<input type="checkbox"/>
Did you name a backup or successor Executor/Personal Representative in your Will?	<input type="checkbox"/>	<input type="checkbox"/>
If you have a Trust: Is the person you've listed as your Trustee/Successor Trustee currently available to manage your Trust if you cannot?	<input type="checkbox"/>	<input type="checkbox"/>
If you have a Trust: Did you name a backup or successor Trustee?	<input type="checkbox"/>	<input type="checkbox"/>
If you have minor children: Did you nominate someone to serve as guardian for your children?	<input type="checkbox"/>	<input type="checkbox"/>
If you have minor children: Did you list a backup guardian?	<input type="checkbox"/>	<input type="checkbox"/>
If you have minor children: If something were to happen to you tomorrow, can the person you nominated as guardian come and take care of your children?	<input type="checkbox"/>	<input type="checkbox"/>
Is the person you've listed as your Agent in your Power of Attorney able to act on your behalf (e.g., write checks, pay bills, etc.) right now if you need him/her to?	<input type="checkbox"/>	<input type="checkbox"/>
Did you list a backup Agent in your Power of Attorney?	<input type="checkbox"/>	<input type="checkbox"/>
Did you execute (sign) your Power of Attorney recently?  <i>*The older the document, the more likely it is that your Agents may encounter resistance from banks and other financial institutions when they try to use it.</i>	<input type="checkbox"/>	<input type="checkbox"/>
Would the person you've listed as your Agent in your Advance Health Care Directive (or Medical Power of Attorney) be able to meet you at the hospital within a reasonable amount of time to convey your medical wishes to healthcare providers if something were to happen to you?	<input type="checkbox"/>	<input type="checkbox"/>
Did you list a backup Agent in your Advance Health Care Directive?	<input type="checkbox"/>	<input type="checkbox"/>
Have you communicated your medical wishes to your chosen Agent(s)? And do you trust that he/she will honor those wishes?	<input type="checkbox"/>	<input type="checkbox"/>
Have you informed your chosen fiduciaries (i.e., decision-makers on your behalf) that they have a role in your estate plan?  <i>*If not, now is a good time to let them know so that you can make any necessary changes if they are NOT willing or able to act in their appointed roles.</i>	<input type="checkbox"/>	<input type="checkbox"/>



**ESTATE PLANNING SELF CHECK-UP**

<b>DISTRIBUTIONS AT YOUR DEATH</b>	<b>YES</b>	<b>NO</b>
Are you still comfortable with the beneficiaries named in your estate plan receiving your account balances and property when you pass away?	<input type="checkbox"/>	<input type="checkbox"/>
Are you satisfied with the amounts/percentages/shares you have designated for each beneficiary?	<input type="checkbox"/>	<input type="checkbox"/>
Has anything changed with your named beneficiaries (due to marriage, divorce, birth or adoption of a child, creditor or legal issues, health issues, substance abuse, etc.) that would make you want to adjust how much or when they receive an inheritance from you?	<input type="checkbox"/>	<input type="checkbox"/>
Would you like to consider adding any charitable organizations as beneficiaries, or if you have already included them, do those organizations still reflect your goals and values?	<input type="checkbox"/>	<input type="checkbox"/>
If you established a distribution plan in your Will or Trust stating the manner and time at which your beneficiaries will receive an inheritance at your passing, are those distribution plans still appropriate based on your beneficiaries' ages, maturity levels, and current personal and financial situations?	<input type="checkbox"/>	<input type="checkbox"/>
Have any of your named beneficiaries already passed away?	<input type="checkbox"/>	<input type="checkbox"/>
If so, did you already include provisions for a backup beneficiary or revise your plan accordingly?	<input type="checkbox"/>	<input type="checkbox"/>
For any backup beneficiaries listed, do those individuals still reflect your wishes?	<input type="checkbox"/>	<input type="checkbox"/>

<b>TRUST FUNDING</b>	<b>YES</b>	<b>NO</b>
If you have a Trust: Is your Trust properly funded (meaning you have transferred ownership of any asset or piece of property into the Trust and/or you have named the Trust as beneficiary for accounts you wish to fund the Trust)?	<input type="checkbox"/>	<input type="checkbox"/>
If you have a Trust: Have you acquired new property (real estate), bank or investment accounts, or other valuable assets since your Trust was initially signed and funded?	<input type="checkbox"/>	<input type="checkbox"/>