



Estate Planning "Check-Up"

Client Name: _____

Please circle your responses to the following:

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|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------|-------------------|
| 1. I have a current Health Care Power of Attorney that authorizes someone I trust to make emergency health care decisions for me in the event I am unable to do so. | Yes | No | Don't Know |
| 2. I have a current Durable Power of Attorney that authorizes someone I trust to handle my financial affairs in the event I become disabled. | Yes | No | Don't Know |
| 3. My Revocable Trust and Power of Attorney include an understandable test to determine my incapacity. | Yes | No | Don't Know |
| 4. If I have a Revocable Living Trust in place as part of my estate plan, it gives instructions for my care and the care of my loved ones if I become disabled. | Yes | No | Don't Know |
| 5. I am certain that my current estate plan will minimize possible federal and state estate taxes at my death, including taxes on my house, life insurance and IRAs. | Yes | No | Don't Know |
| 6. If I have a Revocable Living Trust in place as part of my estate plan, I'm sure that my trust is fully funded so that my family can avoid the delays and expenses of probate. | Yes | No | Don't Know |
| 7. I have taken steps to avoid possible will contests and disputes at my death. | Yes | No | Don't Know |

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| 8. I have taken steps to protect my children's inheritance in the event my surviving spouse chooses to remarry. | Yes | No | Don't Know |
| 9. I have recently checked the beneficiary designations of my retirement plans and life insurance policies, and I am confident that I have not listed my estate or any minor children as either primary or secondary beneficiaries. | Yes | No | Don't Know |
| 10. I have a plan to provide creditor and lawsuit protection for assets passing to my surviving spouse. | Yes | No | Don't Know |
| 11. My current plan provides creditor and lawsuit protection for my childrens' inheritance. | Yes | No | Don't Know |
| 12. My current plan addresses income tax planning. | Yes | No | Don't Know |
| 13. I have a plan to protect my childrens' inheritance from a divorcing spouse. | Yes | No | Don't Know |
| 14. I am satisfied with the persons I named as guardians of my minor children in my current plan. | Yes | No | Don't Know |
| 15. I am satisfied with the persons I named as executor or trustee in my current plan. | Yes | No | Don't Know |
| 16. I am satisfied that my current plan sets up a contingent trust for my minor children. | Yes | No | Don't Know |
| 17. I am aware of all future estate planning fees and expenses, including an understanding of those involved at the time of my death. | Yes | No | Don't Know |
| 18. My children have met with my attorney and fully understand their roles and responsibilities upon my incapacity or death. | Yes | No | Don't Know |