



Annual Estate Plan Review Checklist

Life changes quickly and your estate plan should change with it. Review the items below to make sure your plan will work when you need it. Call or email your attorney or adviser if you believe your documents need updating.

- Durable Power of Attorney for Financial Decisions**—Have you designated the correct Primary Agent and Alternate Agent(s) to manage your financial decisions if you become incapacitated?
- Durable Power of Attorney for Health Care**—Have you designated the correct Primary Agent and Alternate Agent(s) to make your health care decisions if you become incapacitated?
- Health Care Directive**—Does your Durable Power of Attorney for Health Care include a Health Care Directive instructing your agent(s) concerning life support measures?
- Personal Representative**—Does your Will designate the correct Personal Representative and Alternate Personal Representative(s) to make sure that your wishes are honored if you pass away?
- Guardian**—If you have a minor child, does your Will designate the correct Guardian(s) to take care of your child if you pass away?
- Beneficiaries**—Does your Will and/or Revocable Trust correctly describe your wishes for division and distribution of your assets among your beneficiaries if you pass away?
- Outright or hold in trust?**—Does your Will and/or Revocable Trust provide the correct timing of distribution for your beneficiaries? Are your beneficiaries ready to receive outright control of their inheritance or do they need a Trustee to manage it until they are older?
- Distribution Age(s)**—Does your Will and/or Revocable Trust designate the correct age or age(s) your beneficiaries should reach before your Trustee turns over control of their inheritance?
- Trustee**—Have you designated the correct Trustee and Successor Trustee(s) to manage your property for your beneficiaries?

- **Property**—Is the ownership of your assets and your beneficiary designations on accounts and life insurance policies properly coordinated with your Will and/or Revocable Trust?
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