

2020 · WHAT ISSUES SHOULD I CONSIDER BEFORE I UPDATE MY ESTATE PLAN?

BENEFICIARY & FIDUCIARY ISSUES	YES	NO
Have any individuals named as beneficiaries or fiduciaries (e.g. Executor, Trustee) passed away?	<input type="checkbox"/>	<input type="checkbox"/>
Are there any individuals (or charitable organizations) that should be added or removed as beneficiaries (primary or contingent)?	<input type="checkbox"/>	<input type="checkbox"/>
Have there been any marriages or divorces that would impact your estate plan?	<input type="checkbox"/>	<input type="checkbox"/>
Is there a beneficiary with special needs receiving government assistance?	<input type="checkbox"/>	<input type="checkbox"/>
Do you need to protect any beneficiaries from a divorce, creditor issues, substance abuse or gambling issues?	<input type="checkbox"/>	<input type="checkbox"/>
Has the Power of Attorney changed or need to be updated?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to update any of your intentions as outlined in your Living Will?	<input type="checkbox"/>	<input type="checkbox"/>

ASSETS & PROPERTY RELATED ISSUES	YES	NO
Will your estate exceed \$11,580,000 or will your combined estate (if you are married) exceed \$23,160,000? If so, consider strategies to plan for a possible federal estate tax liability.	<input type="checkbox"/>	<input type="checkbox"/>
Could there be assets that were not identified in the current estate plan?	<input type="checkbox"/>	<input type="checkbox"/>
Have you bought or sold a second residence?	<input type="checkbox"/>	<input type="checkbox"/>
Do you own homes, investment property or tangible property in two or more different states?	<input type="checkbox"/>	<input type="checkbox"/>
Have there been any material changes to your assets (ownership or valuation)?	<input type="checkbox"/>	<input type="checkbox"/>

MINORS & CHILDREN RELATED ISSUES	YES	NO
Have any of your children reached age 18 (or the age of majority in your state)? If so, they no longer need to have a guardian or personal representative.	<input type="checkbox"/>	<input type="checkbox"/>
If you have children under age 18, have there been any changes to guardians or trustees?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have an adult child who has no spouse or child? If so, consider talking to your child about implementing their own Powers of Attorney (General and Health Care), perhaps appointing you to act on their behalf if they are unable to do so.	<input type="checkbox"/>	<input type="checkbox"/>

OTHER ISSUES	YES	NO
Have there been any changes to state or federal laws since your estate plan was last reviewed?	<input type="checkbox"/>	<input type="checkbox"/>
Are there digital assets that should be preserved?	<input type="checkbox"/>	<input type="checkbox"/>
Are there any state-specific issues that should be considered such as a state estate tax?	<input type="checkbox"/>	<input type="checkbox"/>

CONSIDERING A FINANCIAL ADVISOR TO HELP NAVIGATE THESE COMPLEXITIES? CONTACT US TODAY.



Thank you for interacting with our checklists. Please contact me if you would like personalized, professional guidance in navigating your situation.

- Use of this checklist is at your discretion and it is up to you to decide whether it is appropriate to your personal situation.
- Use of this checklist should not be considered financial advice or as a recommendation for any particular action.
- This checklist is intended for educational purposes only.
- The laws and rules that exist at the time this was created may change at any time making this checklist obsolete. Check with current laws and rules that apply to your situation.

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