

2023 · 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"/>
> Have there been (or could there be) any births that would impact your estate plan?	<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"/>
> Do you need to update the appointments under your Powers of Attorney (General and/or Health Care)?	<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
> Do you expect your estate will exceed your unused federal estate and gift tax exclusion amount (maximum \$12.92 million, or \$25.84 million if you are married)? If so, consider strategies to plan for a possible federal estate tax liability.	<input type="checkbox"/>	<input type="checkbox"/>
> Do you wish to make specific bequests of assets that were not made 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, do you need to appoint or change the named Guardians and/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"/>

Southshore Financial Planning LLC is a registered investment adviser offering services in the State of Florida and in other jurisdictions where exempted. Registration does not imply a certain level of skill or training.

This publication is for informational purposes only and is not intended as tax, accounting or legal advice, as an offer or solicitation of an offer to buy or sell, or as an endorsement of any company, security, fund, or other securities or non-securities offering. This publication should not be relied upon as the sole factor in an investment making decision. Past performance is no indication of future results. Investment in securities involves significant risk and has the potential for partial or complete loss of funds invested. It should not be assumed that any recommendations made by the Author, in the future, will be profitable or equal the performance noted in this publication.

All opinions and estimates constitute Southshore Financial Planning LLC's judgment as of the date the information was printed and are subject to change without notice. Southshore Financial Planning LLC does not warrant that the information will be free from error. The information should not be relied upon for purposes of transacting securities or other investments. Your use of the information is at your sole risk. Under no circumstances shall Southshore Financial Planning LLC be liable for any direct, indirect, special or consequential damages that result from the use of, or the inability to use, the information provided herein, even if Southshore Financial Planning LLC or a Southshore Financial Planning LLC authorized representative has been advised of the possibility of such damages.

The information herein is provided "AS IS" and without warranties of any kind either express or implied. To the fullest extent permissible pursuant to applicable laws, Southshore Financial Planning LLC (referred to as "Southshore Financial Planning") disclaims all warranties, express or implied, including, but not limited to, implied warranties of merchantability, non-infringement, and suitability for a particular purpose.

Federal tax advice disclaimer: As required by U.S. Treasury Regulations, you are informed that, to the extent this presentation includes any federal tax advice, the presentation is not written by Southshore Financial Planning LLC to be used, and cannot be used, for the purpose of avoiding federal tax penalties. Use of any information presented by Southshore Financial Planning LLC is for general information only and does not represent individualized tax advice, either express or implied. You are encouraged to seek professional tax advice for income tax questions and assistance.

Chris Shoup, Southshore Financial Planning LLC

1600 E 8th Ave., Ste. A200, Tampa, FL 33605

chris@southshorefp.com | 813-406-0544 | www.southshorefp.com