

## Estate Planning Checkup

Please circle your response to each of the following.

- |    |   |     |    |            |     |
|----|---|-----|----|------------|-----|
| 1. | I have a current advance healthcare directive (ACHD) which permits my spouse, children, and/or family to make emergency healthcare decisions for me in the event I am unable to do so.  | Yes | No | Don't Know | N/A |
| 2. | I have a current durable power of attorney which possibly permits my spouse or children to handle my financial affairs in the event I become disabled.  | Yes | No | Don't Know | N/A |
| 3. | My revocable trust or my powers of attorney specify a comfortable test to determine my disability.  | Yes | No | Don't Know | N/A |
| 4. | If I have a revocable living trust in place as part of my current estate plan, my trust gives instructions for my care and the care of my loved ones.   | Yes | No | Don't Know | N/A |
| 5. | My current estate plan will minimize possible federal estate taxes at my death, including taxes on my house, my life insurance, and my IRAs.  | Yes | No | Don't Know | N/A |
| 6. | If I have a revocable living trust in place as part of my estate plan, my trust is fully "funded" (the assets have been properly retitled and placed in the trust) so that my family can avoid the delay, expense, and ordeal of probate. | Yes | No | Don't Know | N/A |
| 7. | My current estate plan protects my children's inheritance in the event my surviving spouse chooses to remarry.  | Yes | No | Don't Know | N/A |
| 8. | I have recently checked the beneficiary designations of my retirement plans and life insurance policies and am confident that I have not listed my estate or any minor children as either primary or secondary beneficiaries.             | Yes | No | Don't Know | N/A |
| 9. | My current estate plan provides creditor and lawsuit protection for assets passed to my surviving spouse.   | Yes | No | Don't Know | N/A |

10.	My current estate plan provides creditor and lawsuit protection for my children's inheritance.	Yes	No	Don't Know	N/A
11.	My current estate plan includes income-tax planning.	Yes	No	Don't Know	N/A
12.	My current estate plan protects my children's inheritance from a divorcing spouse.	Yes	No	Don't Know	N/A
13.	My current estate plan names guardians to take care of my minor children, and I am satisfied that the people named will nurture my children should I die while my children are still young.	Yes	No	Don't Know	N/A
14.	I am satisfied with the persons named as executors, trustees, and attorneys-in-fact in my current estate plan.	Yes	No	Don't Know	N/A
15.	My current estate plan establishes a contingent trust for my minor children.	Yes	No	Don't Know	N/A
16.	To make matters easier for my loved ones and so that my wishes are followed, I have included in my current estate plan a document that specifies my postdeath wishes and names who is to carry them out.	Yes	No	Don't Know	N/A
17.	I have included in my current estate plan a document stating to whom my precious and valuable personal items (such as jewelry, stamp collections, and furniture) are to go upon my death.	Yes	No	Don't Know	N/A
18.	My current estate plan gives my executors, trustees, and attorneys-in-fact the authority to change my estate plan if necessary in the event I become disabled.	Yes	No	Don't Know	N/A
19.	My current estate plan includes provisions for the care and well-being of my pets upon my death.	Yes	No	Don't Know	N/A
20.	I would be interested in meeting with an estate planning attorney to review my current estate plan to ensure that it is complete and in accordance with my purposes.	Yes	No	Don't Know	N/A

