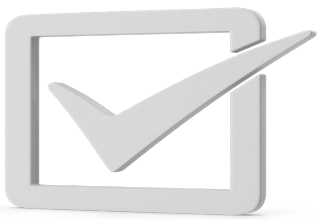
Estate Planning Checklist: Make Sure Your Wishes Are Met

Life doesn't offer many opportunities to prepare for the future, but there's one area where you've got some control—determining how your finances, property, healthcare wishes, family's well-being, and other important matters are dealt with when you're no longer around. Estate planning is the process of designating who manages your assets when you are unable to make these decisions and structuring the inheritance to minimize its tax impact.

Explore the questions below to gauge your level of preparedness. If you answer "NO" to any of them, it's a sign that we should connect to ensure you're on the right path for your estate planning needs.



	YES	NO	N/A
Do you have an estate plan?			
Do you have a will?			
Do you have an advance health care directive (legal designation of someone to make healthcare decisions when you are unable to yourself)?			
Do you have a durable power of attorney?			
Does your will name a guardian for your children in the event both you and your spouse are deceased?			
Are you still living in the same state where you created your estate plan?			
Are your family's status and circumstances the same as when your estate plan was developed?			
Do you have beneficiary designations on all your accounts including life insurance, 401(k)s, IRAs, and other assets?			
Are your beneficiary designations coordinated with your current estate plan?			
Is the value of your estate generally the same as when your estate plan was developed?			
If either spouse is a resident but not a citizen of the United States, have you considered including qualified domestic trust provisions in your estate plan?			

	YES	NO	N/A
If your estate will be subject to estate tax, do you and your spouse each own enough assets to take advantage of your full state tax applicable exclusion amounts?			
Will your family have suffcient liquid assets to pay for the debts and taxes that become due at death?			
Does your estate plan provide suffcient income for your surviving spouse to maintain their lifestyle?			
Is your estate plan flexible enough for potential law changes?			
Do you need a revocable trust?			
If you have a revocable living trust, have you changed the title of your assets to the name of the trust?			
Are you comfortable with your currently chosen executors and trustees?			
Have you communicated your wishes with the executor and trustee?			
Do you have written instructions (sometimes called a “Letter of Instruction,” “Final Instructions” or "Disposition Authorization") for funeral or memorial service arrangements, and burial or cremation arrangements?			
Do you have a buy/sell agreement in place?			

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