



Estate Planning Annual Checklist

You should annually review the following matters to ensure that your estate plan is in accordance with your intentions:

1. Do I have the right people appointed to serve in the following roles in the event I become incapacitated during my lifetime?
 - a. Agent under financial power of attorney
 - b. Agent under health care power of attorney
2. Do I want (or still want) a Living Will (governs the withholding or withdrawing of life-sustaining treatment in the event I am unable to communicate and either terminally ill or permanently unconscious)?
3. Do I have the appropriate people named to serve in the following roles upon my death?
 - a. Guardian of minor children
 - b. Executor of Estate
 - c. Trustee of Trust
4. Do I have the correct beneficiaries and asset distribution terms under my will and Trust?
5. Do I want to provide benefits to any other family members?
6. Do I want to consider charitable giving and the tax benefits thereof either during my lifetime or upon my death?
7. Are my assets properly titled and coordinated with my Trust?
8. Do I want to make annual exclusion gifts (\$15,000)?
9. Are there any new laws (estate tax or otherwise) that impact my estate plan?
10. Do I have the right insurance in place for protection of my assets?
11. Do I have the proper beneficiaries on my retirement plans (i.e., IRA, 401(k), etc.) and life insurance?
12. Consider creating a letter of instruction that provides a list of instructions for your survivors to follow. For example, it can spell out funeral wishes, people to contact, personal data, list of assets and information about your financial matters, digital assets and passwords.
13. Consider funeral pre-planning.