

IS YOUR ESTATE PLAN UP-TO-DATE AND ACCOMPLISHING YOUR GOALS?

NAME: _____

DATE: _____

	NOT INCLUDED	INCLUDED	UNKNOWN OR NOT APPLICABLE
1. Does your trust include a provision to minimize or eliminate the Federal Estate Tax ? Is each spouse's unified credit being utilized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Do you have a current and properly drafted Financial Power of Attorney with all of the specific powers enumerated? The trust cannot solve all problems relating to the need for your signature.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Is your Health Care Power of Attorney current, containing HIPAA provisions? Unlike a Financial Power of Attorney, this gives your agent the authority to make medical decisions.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Do you have a plan to keep your Powers of Attorney and other legal documents current ? Powers of Attorney are notorious for being outdated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Do you have a system that will permit you to access your Powers of Attorney quickly during an unanticipated crisis?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your trust provide a method besides court for determining your incompetency in order to remove you as trustee?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does your trust provide assistance to the Trustor while serving alone as Trustee in the event of a temporary emergency ? A Co-Trustee, or "silent partner" can be available to deal with trust issues.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does your trust provide assistance with a "disability trustee", while serving alone as Trustee, in the event an emergency becomes permanent ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. If your trust is an A/B trust (Decedent/Survivor trusts or Marital/Family trusts), does it give the surviving spouse control with a disclaimer?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. If your trust is an A/B trust does it provide protection for the deceased Trustor's estate in the event the surviving Trustor remarries ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Does your trust protect your children's inheritance from financial disasters, such as divorce, bankruptcy or lawsuits ?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Does your trust take advantage of a little used but very powerful asset transfer technique to transfer the estate, tax free , to your grandchildren upon your child's death?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Answers to the above questions assume that your assets are properly registered in the name of your trust before your death. If they are not, additional problems will exist.

DISCLAIMER: THE INFORMATION CONTAINED IN THIS CHECKLIST IS NOT INTENDED TO BE LEGAL ADVICE AND SHOULD NOT BE CONSTRUED AS LEGAL ADVICE. THIS CHECKLIST IS NOT INTENDED TO BE, AND DOES NOT REPRESENT, A COMPREHENSIVE REVIEW OF YOUR ESTATE PLAN AND, AS SUCH, SHOULD NOT BE USED AS A SUBSTITUTE FOR A CONSULTATION WITH AN ATTORNEY.