ANNUAL ESTATE PLANNING CHECKLIST

My name: _____

My address: _____

Today's date: _____

Please use the checklist below to inform us whether you need or want any changes to your incapacity and estate planning documents. If you don't have a trust, please ignore the Living Trust section.

Yes	No	**ADVANCE MEDICAL DIRECTIVE**
☐	☐	The address/telephone number of one or more of my Agents has changed.
☐	☐	I want to remove one or more Agents.
☐	☐	I want to add one or more Agents.
☐	☐	I want to change the contact information for one or more agents.
☐	☐	I want to change my answers in one or more sections of this document.
☐	☐	I want to confirm that my AMD has been registered with DocuBank; I don't recall receiving my DocuBank card or registration packet, or have misplaced my card.
☐	☐	Other _____

Yes	No	**GENERAL FINANCIAL POWER OF ATTORNEY**
☐	☐	I want to remove one or more Agents.
☐	☐	I want to add one or more Agents.
☐	☐	I have sold or purchased real property.
☐	☐	Other _____

Yes	No	**REAL ESTATE POWER OF ATTORNEY** (if applicable)
☐	☐	I want to remove one or more Agents.
☐	☐	I want to add one or more Agents.
☐	☐	I have purchased real property for which I do not have a Power of Attorney.
☐	☐	Other _____

Yes	No	**LAST WILL & TESTAMENT**
☐	☐	I want to remove or change one or more Guardians.
☐	☐	I want to remove or change one or more Executors and/or Trustees.
☐	☐	I want to change my beneficiaries or change the distribution percentages.
☐	☐	Other _____

Yes	No	**LIVING TRUST**
☐	☐	I want to remove or change one or more current Trustees or Co-Trustees.
☐	☐	I want to remove or change one or more Successor Trustees.
☐	☐	want to change my beneficiaries or change the distribution percentages.
☐	☐	Other _____

Yes	No	**OTHER CIRCUMSTANCES WHICH MIGHT REQUIRE CHANGES**
☐	☐	My address has changed.
☐	☐	My marital status has changed.
☐	☐	One or more children have been born to or adopted by me.
☐	☐	One of my children has died.
☐	☐	I have one or more new step-children.
☐	☐	There has been a death in my immediate family.
☐	☐	One or more of my beneficiaries has become permanently incapacitated or disabled.
☐	☐	My family's net worth has changed by more than $100,000 since last year.
☐	☐	I am single and my current net worth is more than $5 million.
☐	☐	I am single and my current net worth is more than $10 million.
☐	☐	I am single but am planning to get married, so I need a prenuptial agreement.
☐	☐	I have received an inheritance (outright, not in trust).
☐	☐	I am the beneficiary of a trust.
☐	☐	My health has significantly worsened.
☐	☐	I want to add, delete, or change one or more specific bequests.
☐	☐	I want to change the distribution of my tangible personal property.
☐	☐	I want to change the distribution of my real property.
☐	☐	I want to change the distribution of my Residuary Estate.
☐	☐	I have turned 65.
☐	☐	Other _____