

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 _____