

ESTATE PLANNING

✓ Checklist



Is your family prepared for life without you? Are your wishes known and your assets protected in the event of disability, incapacity, divorce, or financial troubles?

Use the checklist below to uncover the areas where your family and assets may be exposed or vulnerable if the unthinkable happens.

Answering “No” or “??” (not sure) to three or more questions is a good indication that estate planning, or an update to your existing plan, may be necessary.

Let Us Help You Take Action!

After completing the checklist, simply call our office at (650) 422-3313 to schedule an estate planning consultation... 100% free, on us! (\$550 value!) Our attorneys will answer any questions you may have and help you begin the process of getting your legal and financial affairs in order, once and for all. Call (650) 422-3313 and mention this resource when you call to request your free appointment.

Answer Yes, No, or ?? (Not Sure) to the following questions:

Family Protection and Peace of Mind

- Yes No ?? You have a basic will
- Yes No ?? You have a living trust
- Yes No ?? Your plan names guardians who can raise minor kids in the event of a parent’s death or incapacity
- Yes No ?? Your children are not co-owners of your bank accounts and/or real property
- Yes No ?? Your plan gives your family access to your digital assets—passwords, online banking, online accounts, social media, email, etc.—in an emergency
- Yes No ?? You are confident that your executor, successor trustee, and medical and financial agents are prepared to act on your behalf when asked to

Accounting For Life Changes

- Yes No ?? You have reviewed all of your estate planning documents in the past two years
- Yes No ?? You have reviewed the beneficiary designations of your retirement accounts and insurance policies in the past two years
- Yes No ?? Your plan reflects your current marital status and does not include an ex-spouse as beneficiary or in a position of power
- Yes No ?? Your plan includes all children, both biological and adopted
- Yes No ?? Your plan reflects all recent purchases or sales of real property

Asset Protection and Wealth Transfer

- Yes No ?? Your plan will not be subject to the unnecessary delays and costs of probate
- Yes No ?? Your trust is fully “funded,” with all assets properly titled in the name of your trust
- Yes No ?? Your plan addresses inheritance protection for your spouse and grown children from future divorce, lawsuits, taxes, and predators that can take the inheritance out of their hands
- Yes No ?? Your inheritance is protected for your children, and not a new husband or wife, should your surviving spouse remarry
- Yes No ?? Your plan properly handles estate or death taxes and is income tax efficient
- Yes No ?? Your plan transfers your values (moral, spiritual, and human) and creates a whole legacy

Maintaining Control of Health Care Decisions and Long-Term Care

- Yes No ?? You have an Advance Healthcare Directive (AHCD) that was signed in the past three years
- Yes No ?? Your AHCD accurately reflects your wishes, especially for end-of-life care
- Yes No ?? You’ve talked to your family about your wishes for health care in the event you are incapacitated and unable to speak for yourself
- Yes No ?? You know how you will pay for long-term care if you need it
- Yes No ?? Paying for long-term care will not leave your spouse or family impoverished

Maintaining Control of Finances and Property During Incapacity

- Yes No ?? You have a Financial Durable Power of Attorney (DPA) signed within the past 3 years
- Yes No ?? You have carefully chosen the best person to manage your finances if you are incapacitated
- Yes No ?? Your DPA is “powerful” and allows your agent to engage in additional planning on your behalf if you are incapacitated
- Yes No ?? Your Trust defines incapacity and identifies who will make that determination