

ESTATE PLAN CHECKUP

Are your loved ones at risk because your estate plan is incomplete?
Use this checkup to make sure your estate plan is in good health.

Circle your answer.

My loved ones know where my up-to-date will is stored.	yes	no	unsure
I have backup executors and guardians for minor children in my will.	yes	no	unsure
I have legally appointed someone to handle decisions for me if I cannot.	yes	no	unsure
I have a strategy in place to save probate and income taxes.	yes	no	unsure
I have provided for loved ones with special needs.	yes	no	unsure
I have a plan to deal with my business if I die.	yes	no	unsure
I regularly preview my estate plan to ensure that it achieves my goals.	yes	no	unsure
I review my loved ones' needs so my estate protects them.	yes	no	unsure
I have an updated inventory of assets and valuable documents.	yes	no	unsure
My life and disability insurance coverage will replace income, cover taxes and gifts.	yes	no	unsure



Estate tip: No one should go through life without planning for their loved ones.