

Your Estate Checklist

- | | Yes | No |
|--|--------------------------|--------------------------|
| 1. Do you have a file, stored in a secure, fireproof location, for all important documents (wills, powers of attorney, securities, contracts, marriage/divorce papers, deeds)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Do you have a will that has been reviewed within the past three years? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Do you have powers of attorney for property and for personal care that have been reviewed within the past three years? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Have you recently reviewed any estate planning changes that should be considered? | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Are you adequately covered by policies of life, liability, disability, other insurance? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Do you have a complete, current personal financial statement listing all your personal assets and liabilities in detail? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Do you have a complete, current inventory of all your physical possessions, sufficiently described to be identifiable for your executor or attorney? | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Have you updated any of the above matters in regard to your spouse, children or persons for whom you may have responsibilities (e.g. aging parents)? | <input type="checkbox"/> | <input type="checkbox"/> |

If you have answered 'No' to any of the questions above and want to take a preventative approach to your legal affairs, please contact me.
I want to help you.