ANDERSON DORN & RADER, LTD.
Legacy & Wealth Planning Attorneys

Relocation Action Plan Checklist

To avoid confusion, stress, financial loss, and family disputes, make sure you do the following as soon as possible. Check off items completed.

Have Conversations with My Family Now

- ☐ Review estate plan together, explain wishes and roles each person will play (*use Estate Plan Review Checklist*)
- ☐ Location or original Will or Trust ____________
- ☐ Review end-of-life choices, funeral wishes and burial arrangements

Review & Update My Estate Plan

- ☐ Date of last review ____________
- ☐ My plan reflects my current wishes as of ____________

Review & List My Beneficiary Designations

- ☐ Retirement Account(s): ____________
- ☐ Life Insurance Account: ____________

Funding My Trust (If Applicable)

- ☐ New assets, homes and/or refinanced homes have been titled in the name of the Trust.
- ☐ My Trust is fully funded.

Collect & Organize My Paperwork

- ☐ Tax Records
- ☐ Real estate (deeds, mortgage, etc.)
- ☐ IRA, 401k and/or Pension
- ☐ Health Insurance
- ☐ Financial Accounts
- ☐ Bank Accounts
- ☐ Stocks, bonds and annuities
- ☐ Long-Term Care Insurance
- ☐ Online Accounts
- ☐ Life Insurance

My Legal & Financial Team to Reach Out to at my Incapacity or Death

- ☐ My Estate Planning Attorney: ____________
- ☐ My Financial Advisor: ____________
- ☐ My Insurance Agent: ____________
- ☐ My Primary Care Physician: ____________

Please contact our office for a **free phone meeting** to see how we can help with any questions you may have.

As a full-service estate planning and elder law firm, we not only help our clients plan for death and incapacity, we also help our clients and their families through the process of administering their estate plans. Our dedicated team helps clients achieve peace of mind, knowing they have done everything possible to protect their families and loved ones.

More Resources Available for You!

✔ Relocation Action Plan Checklist ✔ Estate Plan Review Report ✔ How to Choose a Law Firm

CONNECT WITH US

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