



Relocation Estate Plan Review Checklist

It is important to review your estate plan every 3 years and anytime you move. Check off the areas you have changes to, concerns, or questions about - we're here to help!

Family or Trust Changes

YES NO

- Family Changes:** New in-laws, death of a spouse, divorce, marriage, new child, adoption, blended family, retirement, child with special needs, etc...?
- Changes to:** Executors, Successor Trustees, Guardians Personal Representatives or Powers of Attorney?
- Beneficiary Changes:** Any medical, mental, or substance abuse concerns or distribution changes?

Changes in Assets, Personal Property or Financial Accounts

YES NO

- Any real estate or financial accounts that are NOT in the name of your Trust (property, bank accounts, stock brokerage accounts, bonds, life insurance, etc.)?
- Do you have an IRA, 401k or Pension worth over \$1 million?
- Any retirement account beneficiaries who are NOT your spouse, minor children, disabled individuals or within 10 years of your own age?
- Have you named your Trust as beneficiary to your retirement savings account?
- Have you or a family member received or expect to receive any large bequests or inheritances?
- Real estate or stock that you would like to sell and avoid capital gains taxes on?

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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