



ESTATE PLANNING CHECKLIST

Instructions: Perform a review of the client’s current estate planning. Place a checkmark in the appropriate box for “Yes” or “No” depending upon the responses received in the review. If the answer to any question is “No”, assist the client to ensure that the planning needs are addressed. You can personally assist the client with insurance needs and, for any estate planning needs, make certain the client follows up with a qualified estate planning attorney.

Important Estate Planning Issues For Clients	Yes	No
1. Does the client have a Will?		
2. Does the client have a Revocable Trust?		
3. Has an existing Will or Revocable Trust been reviewed by an attorney within the last two years?		
4. Have the client’s assets been arranged to avoid the unnecessary costs and time delays associated with the probate process?		
5. Has the client’s probate avoidance plan been reviewed within the last two years?		
6. Is the value of the client’s assets (including the value of any business interest and the death benefit of life insurance) under \$3,500,000?		
7. Has the client’s life insurance portfolio been reviewed within the last two years?		
8. Does the client have a Durable Power of Attorney?		
9. Has an existing Durable Power of Attorney been reviewed by an attorney within the last two years?		
10. Does the client have a Health Care Power of Attorney?		
11. Has an existing Health Care Power of Attorney been reviewed by an attorney within the last two years?		
12. Does the client have a Living Will or Health Care Directive?		
13. Has an existing Living Will or Health Care Directive been reviewed by an attorney within the last two years?		
14. Has the client implemented a written plan to pay for long-term care costs?		
15. Has the long-term care plan been reviewed within the last two years?		
16. Does the client have a disability insurance plan?		
17. Has the disability insurance plan been reviewed within the last two years?		
18. Has the client shared his/her wishes with family relating to health care, long-term care and funeral/memorial planning?		