

GOFF LEGAL PC

WE CREATE PEACE OF MIND

ESTATE PLAN REVIEW CHECK LIST

Use this as a guide of items to consider while you review your estate plan and finances to ensure that your wishes are accurately reflected.

Estate Plan

- Agents
 - Do you still like them?
 - Do you still trust them?
 - Do you have their current contact information?
- Assets
 - Do they reflect what you have now?
 - Did you acquire new assets?
- Beneficiaries
 - Does this section of your trust still reflect your wishes?

Health Care Wishes

- Who is listed on your HIPAA waiver?
- Have you made arrangements or have instructions? Write them down.

Review Insurance Policies

- Check beneficiaries
 - Have you listed a minor?
 - Is there any beneficiary listed?
- Add trust as an additional insured for CA real estate

DISCLAIMER: This list is not exhaustive, nor does it include legal advice. If you have concerns, please reach out to an attorney to discuss your situation.

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Bank Accounts and Investments

- Check the title of the account
 - Who is listed as the owner of the account?
- Check the beneficiaries (TOD or POD)
 - Where do you want this account to go?
- Don't forget retirement accounts
 - Who are the beneficiaries?
 - Who are the contingent beneficiaries?

Pets

- Fill out emergency pet information

Digital Assets

- Who will need to get into your accounts?
- Password saver
- Digital Assets

Businesses

- Annual minutes
- Complete Business succession worksheet
- Emergency contact sheet for business

Charitable Giving

- Required Minimum Distributions
- Gifts from IRAs and 401ks
- Talk with the organization about special gifts and options