

Estate Planning Review Checklist

Locate Key Documents

Do you know where your will, trust, or powers of attorney are stored?

Check the Dates

When were these documents last reviewed or updated? We recommend a thorough review every 3-5 years, or at life changes such as births or deaths, marriage or divorce, diagnosis of disease or terminal illness, or at the loss of independence.

Tip: Powers of Attorney should be updated every 10 years.

Review Your Appointments

Are your executor or trustee still the right choice? Would professional trustee support make sense?

Review Beneficiary Designations

Have there been any births, deaths, marriages or divorces in your family since your last review?

Consider Your Assets

Have you acquired or sold significant assets like real estate or a business?

Out-of-State Documents

Have you moved to Texas since your documents were prepared in another state? Have you confirmed they are in alignment with Texas law?

Review Account Titling

Are your accounts titled in a way that is consistent with your estate plan?

Review Medical Documents

Are the people you've designated to assist with medical decisions still the appropriate choice? Do your directives reflect your current preferences for end-of-life care?

Long Term-Care & Medicaid

Have you planned for the possibility of needing Long-Term Care? Are your assets positioned to protect your legacy while ensuring care options?

Consider Tax & Gifting Implications

Taxes could affect your estate. Are you aware of gifting strategies and implications regarding transferring wealth during your lifetime?

If you checked off any of these items that might need attention, or haven't review your documents in recent years, now is the time to act. Our team can assist you in reviewing your Estate Plan to protect what matters most.

Call us today.

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