



## Estate Planning Checklist

Your answers to the following questions are a good indicator of your estate plan's effectiveness:

I have an up-to-date will, prepared by a professional.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
I have an up-to-date Power of Attorney for property.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
I have an up-to-date Power of Attorney for health care.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
I have a formal estate plan that takes advantage of any tax-free rollovers to my spouse or common-law partner (if applicable).	<input type="checkbox"/> Yes	<input type="checkbox"/> No
I have explored the planning opportunities of setting up a testamentary trust.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
My will names an alternate executor in case my first choice should be unavailable.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
My executor and family members know where to find my will, personal financial documents, including past income tax returns, bank accounts, and so on.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
I have taken appropriate steps to protect the assets I brought into my current spousal relationship (if applicable).	<input type="checkbox"/> Yes	<input type="checkbox"/> No
I have reviewed all the elements of my estate plan within the past three years.	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If you answered no to one or more of the questions above, your estate plan might benefit from a professional checkup.	<input type="checkbox"/> Yes	<input type="checkbox"/> No