

Client Name: _____ Financial Advisor _____

“Estate Planning Check-Up”

Please circle your responses to the following:

1. I have a current Health Care Power of Attorney to permit my spouse, children and/or family to make emergency health care decisions for me in the event I am unable to do so. Yes No Don't Know
2. I have a current Durable Power of Attorney to possibly permit my spouse or children to handle my financial affairs in the event I become disabled. Yes No Don't Know
3. My Revocable Trust or Power of Attorneys specify a comfortable test to determine my disability? Yes No Don't Know
4. If I have a Revocable Living Trust in place as part of my estate plan, my trust gives instructions for my care and the care of my loved ones? Yes No Don't Know
5. I am certain that my current estate plan will minimize possible federal estate taxes at my death, including taxes on my house, life insurance and IRA's. Yes No Don't Know
6. If I have a Revocable Living Trust in place as part of my estate plan, I'm sure that my trust is fully funded so that my family can avoid the delays and expenses of probate. Yes No Don't Know
7. I have taken steps to avoid possible will contests and disputes at my death. Yes No Don't Know
8. I have taken steps to protect my children's inheritance in the event my surviving spouse chooses to remarry. Yes No Don't Know

Return completed check-up to:
The Sullivan Firm
info@estateplannermass.com

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9. I have recently checked the beneficiary designations of my retirement plans and life insurance policies, and I am confident that I have not listed my estate or any minor children as either primary or secondary beneficiaries. Yes No Don't Know
10. I have a plan to provide creditor and lawsuit protection for assets passed to my surviving spouse. Yes No Don't Know
11. Does your current plan provide creditor and lawsuit protection for your children's inheritance? Yes No Don't Know
12. Does your current plan address income tax planning? Yes No Don't Know
13. I have a plan to protect my children's inheritance from a divorcing spouse. Yes No Don't Know
14. I am satisfied with the persons I named as guardians of my minor children in my current plan. Yes No Don't Know
15. I am satisfied with the persons I named as executor in my current plan. Yes No Don't Know
16. I am satisfied that my current plan sets up a contingent trust for my minor children. Yes No Don't Know
17. I am aware of all future estate planning fees and expenses and have my updating and estate settlement expenses agreed upon in writing. Yes No Don't Know

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