



Estate Plan Checkup

Presented by: Holmes Shirley Law

Instructions: Take a few minutes to read and circle your answers on the next page. Keep this questionnaire handy so you can refer back to it every year to make sure your estate plan is up-to-date!

If you have questions, or need help, please don't hesitate to call us.
(720) 248-7621

Karen

Estate Plan Check-Up

Circle One

Do you have a Will or a Trust in place?Yes No Don't Know

Are you satisfied with the person(s) selected as personal representative (executor) and trustee in your current estate plan?Yes No Don't Know

Does your estate plan contain a customized plan to determine if you are mentally disabled?Yes No Don't Know

Are your financial and medical agents documented in separate Powers of Attorney to protect your assets while also taking into account HIPAA?Yes No Don't Know

Does your current Health Care/Medical Power of Attorney permit the person of your choosing (spouse, child, family) to make emergency health care decisions for you in the event you are unable to do so? Yes No Don't Know

Does your current estate plan give instructions for your care and the care of your loved ones in the event of disability?.....Yes No Don't Know

Are you satisfied with the person(s) you named as guardians of minor children in your current plan?Yes No Don't Know

Have any of your children become legal adults since you executed your plan..... Yes No Don't Know

Have you taken steps to avoid possible will contests and disputes during the administration of your estate?Yes No Don't Know

Are you certain that your current estate plan will minimize possible federal and state taxes at your death, including estate and/or income taxes on your house, life insurance and IRAs?.....Yes No Don't Know

If you have a Revocable Living Trust in place as part of your estate plan, is your trust fully funded so that your family can avoid the delays and expenses of probate?Yes No Don't Know

Have you recently checked the beneficiary designations of your retirement plans and life insurance policies and are you confident that you have not listed your estate or any minor children as either primary or secondary beneficiaries?Yes No Don't Know

Has your estate plan been professionally reviewed in the last three years?.....Yes No Don't Know

Have you circled a few "No's" or "Don't Know's" on this page? If so, then call to schedule a time so we can help you get everything up-to-date. Call 720-248-7621 to make an appointment with Karen now.