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Estate Planning Checklist

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General information	Yes	No	N/A
1. Has relevant personal information been gathered? • Personal details • Family details • Current advisory team • Goals and expectations	❑	❑	❑
2. Has financial situation been assessed? • Assets • Liabilities • Life insurance policies • Other insurance coverage • Income • Expenses	❑	❑	❑
3. Have current documents been reviewed? • Will • Trust documents • Power of attorneys • Medical directives • Insurance policies • Buy-sell agreements • Deeds, leases, mortgages, and land contracts • Guardian nominations • Separation/divorce agreements • Tax returns	❑	❑	❑
4. Have funeral arrangements been made?	❑	❑	❑
Notes:			

Basics	Yes	No	N/A
1. Is there currently a valid will?	❑	❑	❑
2. If yes, does will reflect current goals and objectives?	❑	❑	❑
3. Does choice of executor remain appropriate?	❑	❑	❑
4. Has durable power of attorney been executed?	❑	❑	❑
5. Have medical directives been executed?	❑	❑	❑
6. Have beneficiary designations for retirement plans and life insurance policies been reviewed?	❑	❑	❑
7. Has impact of probate been considered?	❑	❑	❑

Notes:

Trusts	Yes	No	N/A
1. Is the use of a living trust appropriate?	❑	❑	❑
2. Is the use of a testamentary trust appropriate?	❑	❑	❑
3. Is the use of an irrevocable life insurance trust appropriate?	❑	❑	❑
4. Do existing trusts, if any, continue to meet overall objectives?	❑	❑	❑

Notes:

Estate tax	Yes	No	N/A
1. Has estate plan been reviewed due to changing tax laws?	❑	❑	❑
2. Has impact of estate tax been evaluated?	❑	❑	❑
3. Have options to minimize estate tax been explored? • Lifetime gifting • Full use of basic (applicable) exclusion amount and marital deduction • Qualified terminable interest property (QTIP) elections • Qualified domestic trust (QDT) for noncitizen spouse • Charitable giving • Grantor retained trusts • Family limited partnership (FLP)/limited liability company (LLC)	❑	❑	❑

Notes:

Lifetime gifting	Yes	No	N/A
1. Have gifts been made?	❑	❑	❑
2. Has a lifetime gifting strategy been implemented?	❑	❑	❑
3. Are gift tax consequences understood?	❑	❑	❑
4. Has consideration been given to types of property suitable for gifting?	❑	❑	❑

5. Is valuation discount planning understood?	❑	❑	❑
Notes:			

Charitable intentions	**Yes**	**No**	**N/A**
1. Have charitable gifts or bequests been planned?	❑	❑	❑
2. Is a charitable trust appropriate? • Charitable lead trust • Charitable remainder trust • Pooled income fund • Private foundation • Donor-advised fund	❑	❑	❑
3. Is a charitable gift annuity appropriate?	❑	❑	❑
4. Is the charitable gift of a remainder interest in a home or farm appropriate?	❑	❑	❑
Notes:			

Life insurance issues	**Yes**	**No**	**N/A**
1. Have liquidity needs of estate at death been evaluated?	❑	❑	❑
2. Is current life insurance coverage appropriate?	❑	❑	❑
3. Have steps been taken to keep life insurance proceeds out of taxable estate? • Policy ownership • Irrevocable life insurance trust	❑	❑	❑
4. Have beneficiary choices been evaluated in light of overall estate plan?	❑	❑	❑
Notes:			

Business interests	**Yes**	**No**	**N/A**

1. Have provisions been made to transfer business interest? • Buy-sell agreement and necessary funding • Sell business • Transfer business with lifetime gifts • Key person buyout	❑	❑	❑
2. Is liquidation an option?	❑	❑	❑
Notes:			

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