

Estate Planning Checkup

Are You Ready?

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| 1. | I have a current Health Care Power of Attorney to permit my life partner or family to speak to a doctor on my behalf and make medical decisions for me in the event I am unable to do so. | Yes | No | Don't Know |
| 2. | I am satisfied with the persons I named as guardians (back-up parents) of my minor children in my current plan. | Yes | No | Don't Know |
| 3. | If I have a Revocable Living Trust in place as part of my estate plan, I'm sure that my trust is fully funded. | Yes | No | Don't Know |
| 4. | I have taken steps to avoid possible contests of my will and disputes at my death. | Yes | No | Don't Know |
| 5. | I have taken steps to protect my children's inheritance in the event my surviving spouse chooses to remarry. | Yes | No | Don't Know |
| 6. | After my divorce, I updated my will; and I am confident that my ex-spouse is no longer listed as a beneficiary on my life insurance policy. | Yes | No | Don't Know |
| 7. | My current plan provides creditor and lawsuit protection for my children's inheritance. | Yes | No | Don't Know |
| 8. | I am certain that my current estate plan will minimize possible federal and state estate taxes at my death, including taxes on my house, life insurance, and IRAs. | Yes | No | Don't Know |
| 9. | I am satisfied with the persons I named as executor or trustee in my current plan. | Yes | No | Don't Know |
| 10. | My adult children fully understand their roles and responsibilities upon my incapacity or death. | Yes | No | Don't Know |



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(410) 721-4569

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