Your Estate Plan:
A Quick Annual Review

As life changes, your estate plan evolves with it.
Use this simple checklist to make sure your plan still reflects your wishes, your assets, and the people you care about most.

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LIFE CHANGES IN THE PAST YEAR

- ☐ Marriage, divorce, or new partnership
- ☐ Birth or adoption of a child or grandchild
- ☐ Death or incapacity of a Grantor, Trustee, guardian, or nominated agent
- ☐ Changes in guardians, trustees, or executors
- ☐ Move within or outside of California

FINANCIAL CHANGES

- ☐ Purchased or sold a home or property
- ☐ Opened financial accounts in the name of the Trust
- ☐ Significant increase or decrease in assets
- ☐ Started or sold a business
- ☐ Changes to retirement accounts or beneficiaries

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Your Estate Plan Confidence Score

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YOUR CURRENT PLAN

- ☐ I have a living trust
- ☐ My trust assets are correctly titled in the name of trust
- ☐ My will reflects my current wishes
- ☐ My powers of attorney are up to date
- ☐ My healthcare directive reflects my preferences

ASK YOURSELF

- ☐ Does my distribution plan still make sense?
- ☐ Would someone know what to do if I became incapacitated?
- ☐ Do my agents know where to find my documents?
- ☐ Have I reviewed my plan in the last 12–24 months?

DIGITAL & PRACTICAL DETAILS

- ☐ My passwords or password manager are documented
- ☐ My healthcare directive agents and contact information is up-to-date
- ☐ Key documents are stored in a known, secure location
- ☐ Emergency instructions are easy to find

CALL TO ACTION

Your checklist highlights strengths as well as potential gaps. If you identified gaps or your circumstances have changed, it may be time for a review.

CONTACT US

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