

Estate Planning Checklist

Complete the following to find out whether your estate plan is effective. If you answer **NO** to any of these questions, **we invite you to come in for a consultation.**

1. Do you have a current written estate plan? Yes / No
2. Do you know that a Will based estate plan GUARANTEES a Probate Court proceeding? Yes / No
3. If you already have a "Living Trust" are all of your assets properly titled in the name of the trust? Yes / No
4. Will your estate plan reduce or eliminate estate taxes? Yes / No
5. Are your children's inheritances protected in the event of divorce, creditors and lawsuits? Yes / No
6. If you become disabled, will your estate plan avoid the necessity of a probate court appointed Guardian and/or Conservator? Yes / No
7. Does your estate plan include a written "HIPAA Authorization" that allows the release of your medical information to your designees? Yes / No
8. Are your health care emergency directives available from anywhere in the world? Yes / No
9. Is your retirement plan set up to allow your children to "stretch out" the tax deferred growth over their lifetimes, with the added benefit of asset protection? Yes / No
10. If you have minor children, have you named guardians and alternate guardians in your estate plan? Yes / No
11. Does your attorney offer an "Estate Maintenance Program" to review your plan on an annual basis? Yes / No
12. Are any of your children a joint tenant with you on any bank accounts or deeds to real estate? Yes / No
13. Do you have children by a prior marriage? Yes / No
14. Do you own real estate in a state other than Michigan? Yes / No