



What do you need to discuss with your loved ones?

Family Care Planning

YES NO

- Who is the executor of the estate? How often is this reviewed?

- Who is the trustee of any trusts that were created? How often are the trusts reviewed?

- What are the advanced medical directives on file?

- Is there a need to set up a Power of Attorney?
- Do you have readily accessible copies of your estate planning documents?
- Are all assets properly titled and do you have a centralized database of who owns what asset?
- How often do your elder's review their beneficiary arrangements? _____
- Do the beneficiaries know they are going to receive a bequest/income/etc.?
- When is the last time the will was reviewed and were all proper execution procedures followed?
- Have you developed a strategy on sale of home(s) or other real estate? Will they be liquidated or passed on? _____
- Do you have a strategy on home accessibility improvements needed inside and outside the dwelling?
- Do you have a strategy for alternative living arrangements and does it factor in lifestyle considerations?
- Have you completed a comprehensive insurance review and update: assessment of changes in overall exposures and coverage?
- Have you considered Long-term care insurance versus a self-funding care strategy?
- When was the last review of wealth transfer gifting plans?
- Where are all the estate, tax, and trust documents kept and do you have digital copies?

- Have you reviewed all of your bank accounts and assets and consolidated where possible?
- Do you have documentation for all of your banking and brokerage relationships?
- Have you reviewed the investment portfolios and do the allocations adequately consider risk tolerance, gifting considerations, and income concerns?
- Have you reviewed the liabilities to be assumed by the estate and beneficiaries?
- Does the estate have proper liquidity to meet any immediate expenses and fund your loved one's estate planning goals?
- Do you have applicable passwords to any device, program and/or website that would give you access to any of the documents and/or information listed above?

Once completed, you will now have all of the pertinent information you need in one convenient location. If you would like to discuss any of the information in more detail or have any additional questions, please do not hesitate to reach out to our office.

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