

Estate Plan Review Diagnostic

We have provided the following complimentary review diagnostic to help you identify any life changes that would prompt a review of your trust and overall estate plan. This form is not an exhaustive list and is not a substitute for legal advice.

If you answer yes to any of the previous questions, we urge you to contact our office for an Estate Plan Review with an expert Estate Planning Attorney by calling **(866) 988-3956** or [book an appointment online](#). *Any* of the life changes on the worksheet may require a need for a review of your living trust-centered estate plan.

General Estate

		Yes	No	Notes/Questions:
1	Has someone named in your estate planning documents died? <i>(Living Trust, Will, Power of Attorney, Healthcare Documents, etc.)</i>			
2	Have you gotten married, divorced, had or adopted a child?			
3	Do your distributions need to be changed to reflect your current wishes?			
4	Have you moved to or from another state?			
5	Have you lost or misplaced your estate planning documents?			

Health

		Yes	No	Notes/Questions:
6	Are you or your spouse very ill or scheduled for high-risk surgery?			
7	Is your spouse incapacitated?			
8	Would you like to change who makes your Health Care decisions when you can't?			

Successor Trustee

		Yes	No	Notes/Questions:
9	Have you lost confidence in or want to change the trustee you have appointed or are they no longer willing or able to perform this duty?			
13	Does your trust list <u>no</u> Trust Protector?			

Beneficiaries/Distributions

14	Do you want to add or change <i>who gets what</i> when you die?	Yes	No	Notes/Questions:
15	Have there been any significant life changes with those named in your Living Trust as beneficiaries? (such as divorce, health issues, or if they are now receiving government assistance)	Yes	No	

Guardianship/Conservatorship

17	Do you need to change guardianship/conservatorship nominations or backup nominations for children?	Yes	No	Notes/Questions:
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Tax/Law Changes

19	Has any tax or other law impacted your estate? Contact our office for any updates at (866) 988-3956	Yes	No	Notes/Questions:
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Assets / Wealth

20	Have you opened new bank / investment accounts, purchased a new home, property, vehicle or life insurance since your trust was created?	Yes	No	Notes/Questions:
21	Have you started or sold a business since your trust was signed?	Yes	No	
22	Have you experienced significant financial gains or losses?	Yes	No	
23	Have you received an inheritance since establishing your trust?	Yes	No	
25	Are you interested in transferring property or a business to a child during your lifetime?	Yes	No	

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