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ESTATE PLAN CHECKLIST

A good estate plan means that you and your family are adequately prepared for you death and/or incapacity. Further, good planning means that your wishes are followed and that your assets are distributed to your heirs with as few problems and costs as possible. Please use the below to consider important parts of your estate plan that you may have overlooked. While the below may not apply to all of our clients, this is a good checklist to follow to help ensure that you created a good estate plan. Ask yourself, have I:

- | <u>YES</u> | <u>NO</u> | |
|------------|-----------|--|
| ___ | ___ | Recently reviewed my Will and/or Trust to confirm that it is accurate to my wishes and needs? |
| ___ | ___ | Created a durable power of attorney, health care surrogate and living will? |
| ___ | ___ | Do I know where my original estate planning documents are? Are you sure that you have the original documents? |
| ___ | ___ | Considered creating a Revocable Living Trust in order to save my heirs time and money? |
| ___ | ___ | Funded the living trust you have created? |
| ___ | ___ | Considered where all of your assets are distributed upon your death, including assets that are jointly held and assets that have beneficiary designations? |
| ___ | ___ | Reviewed the beneficiary designations of your life insurance, IRA, 401ks and annuities to make sure they are consistent with your wishes? |
| ___ | ___ | Considered creating a "separate writing" for distributions of specific items of personal property in your will? |
| ___ | ___ | Updated my current durable power of attorney? It is generally advisable to update a power of attorney every five years because of their ability to become impractical over time. |
| ___ | ___ | Discussed with my attorney any special concerns I have about my children, such as family conflicts, creditor problems and other family situations? |
| ___ | ___ | Discussed my wishes and directions with my family, including those nominated as my executor, trustee, power of attorney, etc.? |
| ___ | ___ | Considered naming a professional trustee upon your death? This is suggested in cases with a potential for conflict among beneficiaries or if there is a large estate or complicated distributions. |
| ___ | ___ | Confirmed that my safe deposit box has a child or heir on it in the event of my death? |
| ___ | ___ | Considered purchasing long-term care insurance? |
| ___ | ___ | Properly provided for children or potential heirs on SSI or Medicaid or who are otherwise disabled? |
| ___ | ___ | Placed your original estate planning documents in a safe place accessible to your heirs? |
| ___ | ___ | If you have a high net worth estate, i.e., that exceeding one million dollars, have you reviewed your estate plan with your attorney more frequently? |

If you have answered "No" to some of the above questions, you may need to discuss these issues with us to solve these potential problems.