

ASSETS TRANSFER CHECKLIST

Take the Next Step

1	Do you have a will?	<input type="checkbox"/> YES <input type="checkbox"/> NO
2	Is your state of residence the same as it was when your assets transfer plan was developed?	<input type="checkbox"/> YES <input type="checkbox"/> NO
3	Is your family's status the same as when your assets transfer plan was developed?	<input type="checkbox"/> YES <input type="checkbox"/> NO
4	Does your will name a guardian for your children in the event both you and your spouse are deceased?	<input type="checkbox"/> YES <input type="checkbox"/> NO
5	Are you comfortable with the executor(s) and trustee(s) you have selected?	<input type="checkbox"/> YES <input type="checkbox"/> NO
6	Have you made sure that your property ownership and beneficiary designations are coordinated with your assets transfer planning documents?	<input type="checkbox"/> YES <input type="checkbox"/> NO
7	Is the value of your estate generally the same as when your assets transfer plan was developed?	<input type="checkbox"/> YES <input type="checkbox"/> NO
8	If you have a revocable living trust, have you changed the title of your assets to the name of the trust?	<input type="checkbox"/> YES <input type="checkbox"/> NO
9	Have you executed a durable power of attorney and the appropriate healthcare documents?	<input type="checkbox"/> YES <input type="checkbox"/> NO
10	If either spouse is a resident but not a citizen of the United States, have you considered including QDOT (Qualified Domestic Trust) provisions in your assets transfer plan?	<input type="checkbox"/> YES <input type="checkbox"/> NO
11	If your estate will be subject to estate tax, do you and your spouse each own enough assets to take advantage of your full estate tax applicable exclusion amounts?	<input type="checkbox"/> YES <input type="checkbox"/> NO
12	If each spouse owns enough assets to take advantage of the estate tax applicable exclusion amount, are both your assets transfer plan and your spouse's designed to take advantage of this amount?	<input type="checkbox"/> YES <input type="checkbox"/> NO
13	Have you considered taking advantage of the annual gift tax exclusion?	<input type="checkbox"/> YES <input type="checkbox"/> NO
14	Do you have sufficient liquid assets to pay the debts and taxes that become due at death?	<input type="checkbox"/> YES <input type="checkbox"/> NO
15	Does your assets transfer plan provide sufficient income for your surviving spouse to maintain his or her lifestyle?	<input type="checkbox"/> YES <input type="checkbox"/> NO
16	Are you certain your assets transfer plan is up-to-date and takes into account potential tax-saving strategies?	<input type="checkbox"/> YES <input type="checkbox"/> NO