



## DO I NEED TO UPDATE MY ESTATE PLAN? HAS ANYTHING CHANGED? CHECKLIST

If you answer yes to any of these questions, then you should update your estate plan.  
My Team and I would love to help, please call me for a FREE consultation.

- Any Increase or decrease in your assets
- Wedding, divorce, break up
- Children have grown up
- Started a business
- Birth or adoption of a child or grandchild
- Need to care or provide for a loved one with a mental health issue, disorder, or developmental disability
- Loss of your executor, guardians, trustees, etc.
- Desire to change your executor, guardians, trustees, etc.
- Desire to provide for a charitable or other organization
- Desire to change your heirs or beneficiaries
- Bought or sold a home or other real property
- Receive an inheritance
- Loss of a loved one
- Moved out of state
- Sold a business
- Need to pay for nursing home

### BRIEF RETIREMENT QUESTIONS

- ARE YOU SATISFIED AND FEEL SAFE WITH YOUR CURRENT RETIREMENT INCOME SCHEDULE?
- IS YOUR RETIREMENT INCOME GUARANTEED FOR LIFE, NO MATTER HOW LONG YOU LIVE?
- DO YOU HAVE INSURANCE THAT COVERS NURSING HOME COSTS?
- DO YOU HAVE INSURANCE FOR IF YOU BECOME DISABLED OR TERMINALLY ILL?
- DO YOU HAVE A SATISFIED LIFE INSURANCE POLICY SET IN PLACE FOR YOUR HEIRS?
- ARE YOU MAXIMIZING YOUR TAX SAVING STRATEGIES FOR LIFE AND DEATH?
- DID YOU KNOW YOU CAN SELL OFF ALL OR A PORTION OF YOUR LIFE INSURANCE POLICY, EVEN TERM INSURANCE... WOULD YOU LIKE TO KNOW MORE ABOUT THIS?