

## Estate Planning Worksheet

If you accumulate significant financial assets, you are targeted for estate taxes besides income and capital gains taxes. Estate planning can protect your assets from lawsuits, unnecessary probate costs, and taxes.

- |   |                              |                             |
|---|------------------------------|-----------------------------|
| Do you have a valid will for your current state of residence?           | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Has the will been reviewed and updated recently by an attorney?         | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Do you have durable powers of attorney for financial and health care?   | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Do you have a living will?  | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Do you have a revocable living trust?                                   | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Do you have an irrevocable trust?                                       | Yes <input type="checkbox"/> | No <input type="checkbox"/> |
| Do you know what the taxes and settlement costs of your estate will be? | Yes <input type="checkbox"/> | No <input type="checkbox"/> |