



*When you need help.*

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### ESTATE PLANNING CHECKLIST

A good estate plan means that you and your family are adequately prepared for your death and/or incapacity. This also means that your wishes are followed and that your assets are distributed to your heirs with as few problems as possible. Please use the below to consider important parts of your estate plan that you should consider. While every item 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 and that it is up to date. Ask yourself, have I:

- | <u>YES</u>               | <u>NO</u>                |  |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Recently reviewed my Will and/or Trust to confirm that it is accurate to my wishes and needs?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Do I know where my original estate planning documents are?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Considered creating a Revocable Living Trust in order to save my heirs time and money?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Funded the Revocable Living Trust you have created?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Considered where all of your assets are distributed upon your death, including assets that are jointly held and assets that have beneficiary designations? Note that your will or trust does not necessarily direct the beneficiary of all of your assets. |
| <input type="checkbox"/> | <input type="checkbox"/> | Reviewed the beneficiary designations of your life insurance, IRA, 401ks and annuities to make sure they are consistent with your wishes?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Considered creating a "separate writing" for distributions of specific items of personal property to certain people?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Created a durable power of attorney, health care surrogate and living will?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Updated my 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.   |
| <input type="checkbox"/> | <input type="checkbox"/> | Considered your children's potential divorce and how your own estate plan can protect your heirs from their future ex-spouses?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Confirmed that my safe deposit box has a child or heir on it in the event of my death?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Considered purchasing long-term care insurance?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Placed your original estate planning documents in a safe place accessible to your heirs?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Create a specific living will showing your wishes?   |
| <input type="checkbox"/> | <input type="checkbox"/> | Discussed your end-of-life wishes with your family?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Made a list of your assets for your family?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Discussed your funeral wishes with your family?  |
| <input type="checkbox"/> | <input type="checkbox"/> | Considered creating an irrevocable trust to protect your assets from the high cost of nursing home care?   |

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.