

Your Estate Checklist:

	Yes	No
Do you have a file, stored in a secure, fireproof location, for all important documents (wills, powers of attorney, securities, contracts, marriage/divorce papers, deeds)	<input type="radio"/>	<input type="radio"/>
Do you have a will that has been reviewed within the past three years?	<input type="radio"/>	<input type="radio"/>
Do you have powers of attorney for property and for personal care that have been reviewed within the past three years?	<input type="radio"/>	<input type="radio"/>
Are there any estate planning changes that should be considered?	<input type="radio"/>	<input type="radio"/>
Are you adequately covered by policies of life, liability, disability, other insurance?	<input type="radio"/>	<input type="radio"/>
Do you have a complete, current personal financial statement listing all your personal assets and liabilities in detail?	<input type="radio"/>	<input type="radio"/>
Do you have a complete, current inventory of all your physical possessions, sufficiently described to be identifiable for your executor or attorney?	<input type="radio"/>	<input type="radio"/>
Are there any above matters that should be updated in regard to your spouse, children or persons for whom you may have responsibilities (e.g., aging parents?)	<input type="radio"/>	<input type="radio"/>