

ESTATE PLANNING CHECKLIST

- Do you have an up-to-date will? Yes No Not sure
- Does your will name a guardian for your children? Yes No Not sure
- Are you still comfortable with the executor(s) of your will? Yes No Not sure
- Have you considered a living trust to avoid probate? Yes No Not sure
- Are you taking maximum advantage of tax credits, exemptions, and the marital deduction? Yes No Not sure
- Is the amount of life insurance you own adequate to cover any estate taxes you may owe? Yes No Not sure
- Is the type of life insurance you have appropriate for your situation? Yes No Not sure
- Have you removed your life insurance from your estate? Yes No Not sure
- Are you taking advantage of the annual gift tax exclusion (\$12,000 in 2007)? Yes No Not sure
- Have you created any trusts? Yes No Not sure
- If so, do they qualify for the annual gift tax exclusion? Yes No Not sure
- Are you planning on gifting assets to charity? Yes No Not sure
- Do you know the total value of your current estate? Yes No Not sure
- Are you anticipating a large inheritance? Yes No Not sure