



10 Point Estate Planning Checklist

1. When you established your present estate plan, did you realize that God was the owner of all, and was your estate plan designed under the direction of the Holy Spirit?
Yes _____ No _____
2. Do you have a durable power of attorney to manage property in case of incompetency prior to death? Yes _____ No _____
3. Has your estate plan been reviewed within the last three years?
Yes _____ No _____
4. Do you have a letter of instructions for the distribution of household goods and personal effects? Yes _____ No _____
5. Have you considered the many advantages of a living trust?
Yes _____ No _____
6. Have there been substantial changes in people, property or plans for your estate?
Yes _____ No _____
7. Have you done everything possible to avoid future interpersonal conflicts among family members? Yes _____ No _____
8. Is the ownership of your property coordinated with your estate documents?
Yes _____ No _____
9. Have you provided for guardianship and property management for minor children?
Yes _____ No _____
10. Are you totally comfortable with your existing estate plan?
Yes _____ No _____



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