

## DISABILITY AND ESTATE PLANNING CHECKLIST

Disability and Estate Planning Checklist	Yes	No	Don't Know	Needs Action
1. Have I memorialized in writing the management of my health care decisions and end of life care if I am incapacitated? <ul style="list-style-type: none"> <li>• Durable Power of Attorney?</li> <li>• Health Care Directive (or Living Will)?</li> <li>• POLST?</li> </ul>				
2. Have I memorialized in writing the management of my financial affairs if I am incapacitated? <ul style="list-style-type: none"> <li>• Durable Power of Attorney?</li> <li>• Trust?</li> <li>• Joint Tenancy?</li> </ul>				
3. Do I know a representative payee with Social Security Administration or Veterans Benefits is different than an agent under a Durable Power of Attorney?				
4. Who is named on the title to my assets, and in what capacity?				
5. What are the values of my assets and liabilities? Do I have a list or a simple balance sheet?				
6. Do I have a Washington taxable estate? Will my spouse have a Washington taxable estate?				
7. Do I have a valid Will? If yes, does my Will reflect my current wishes and intentions for my probate estate disposition?				
8. When was the last time I checked my beneficiaries on my accounts and transfer on death policies? Are they still correct?				
9. Do I know the difference between probate assets and non-probate assets?				
10. I have prepared a letter to my family or a journal about personal documents, financial papers & accounts, contact information for family and friends, names of professionals to notify, preferences for funeral services, and organs/body donations.				
11. Do I need a Special Needs Trust for a disabled person?				
12. Do I need a trust or guardianship for an adult child with special needs, financial, or substance abuse issues?				

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<p>13. My agent can manage my personal affairs because I have planned for the following if I am incapacitated:</p> <ul style="list-style-type: none"> <li>a. Representative Payee for Social Security Administration</li> <li>b. Representative Payee for Veterans Administration</li> <li>c. Durable Power of Attorney for Finances</li> <li>d. Durable Power of Attorney for Health Care Decisions</li> <li>e. Health Care Directives (Living Will)</li> <li>f. Guardians or Trusts for Minors or Adult Child with Special Needs</li> <li>g. Successor Trustees of Trust</li> <li>h. Business Succession Plans for Ownership in a Business</li> <li>i. Life Insurance for Spouse to buy out a Partner in a Business</li> <li>j. Disability Insurance</li> <li>k. Long Term Care Insurance</li> </ul>				
<p>14. My current estate plan uses the following to transfer my estate to my heirs?</p> <p>State Statutes: Property is distributed by state law because I do not have a Last Will and Testament.</p> <p>By contract: Property owned and titled as “joint tenants with right of survivorship (JTWROS),” or named beneficiaries on my life insurance or accounts which pass outside of a Will.</p> <p>Trusts: Property owned by a trust and managed by a trustee for the benefit of the trust’s beneficiaries.</p> <p>Inter vivos Gifts: Property gifted to another during your lifetime.</p> <p>Will: Probate assets distributed to heirs named in your Last Will and Testament in a court probate proceeding.</p>				