

DISABILITY AND ESTATE PLANNING CHECKLIST

Check the best answer for each statement: Yes, No, Don't Know, Needs Action.

Estate Planning Tasks	Yes	No	Don't Know	Needs Action
1. Do I have a Durable Power of Attorney for the management of my health care decisions if I am incapacitated?				
2. Do I have documents to authorize management of my finances if I become incapacitated?				
3. Do I have a Health Care Directive (also known as a Living Will) for my end of life care?				
4. Do I know the titling and value of my estate's assets and liabilities and have a list?				
5. Is my Last Will and Testament current, valid, and memorialize my wishes and intended disposition?				
6. Do I know who my assets are titled and how they would pass to my beneficiaries?				
7. I have prepared a letter to my family that includes location of personal documents, financial papers & accounts, names, addresses, phone numbers of family, personal friends, personal/financial professionals to be notified of death, preferences for funeral services, and Organs/body donations.				
8. Do I need a Special Needs Trust for a disabled person?				
9. Do I need a trust for a child with financial or substance abuse issues?				

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<p>10. My current estate plan uses the following to transfer my estate to my heirs?</p> <p>State Statutes: Property 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)", accounts with named payable on death designations or named beneficiary designations, or life insurance pass directly to beneficiary outside of Will.</p> <p>Trusts: Property owned by a trust which are managed by a trustee for the benefit of the trust's beneficiaries where distributions are made pursuant to the trust agreement.</p> <p>Inter vivos Gifts: Property given to another as gifts during your lifetime.</p> <p>Will Property distributed pursuant to your Last Will and Testament to your beneficiaries. Will becomes effective when entered into probate court.</p>					