



ESTATE PLAN REVIEW

Thank you for scheduling an estate plan review with The TGQ Law Firm! Reviewing your estate plan, will, and/or trust regularly will ensure you're properly covered as intended when the plans were made.

To help determine quickly and easily whether your current plan is still appropriate and adequate for the changes in the law, your current circumstances, and future needs, I've put together a checklist. Please take a few minutes to read through this checklist and determine if any of these events have occurred since we last reviewed your plan. Have you:

- Increased or decreased your mortgage(s)?
- Increased or decreased assets of any account in a significant manner?
- Changed homes (acquired or sold property)?
- Entered into a new relationship?
- Separated from your partner or spouse?
- Had more children (or grandchildren)?
- Established a family trust?
- Transferred the ownership of your home or other insured assets to a family trust?
- Changed from salaried employment to being self-employed?
- Changed your goals?
- Considered changing fiduciaries of your power of attorney or will/trust?
- Have you had any changes in health that you believe would be important to share?



CONTACT INFORMATION

Client Name(s): _____

Current Primary Phone Number: _____

Current Primary Email Address: _____

ASSETS - REAL ESTATE

It is important that your updated plans reflects the current state of your assets. For each property, please indicate the following:

- Full address of property
- Full name of owner or owners of property
- Approximate value and mortgage owed on property

Property Address	Owner Name	Home Value	Mortgage Owed



ASSETS - BANKING

This section refers to cash and cash equivalents. For each account, please provide the following:

- Bank
- Account number
- Amount

Bank	Account Number	Amount

ASSETS - LIFE INSURANCE

For each policy, please indicate the following:

- Insurance Company
- Policy Type (e.g., group, term, whole, accident)
- Beneficiary
- Approximate Death Benefit

Insurance Company	Policy Type	Beneficiary	Death Benefit



ASSETS - LONG-TERM CARE INSURANCE

For each field, please indicate the following:

- Insurance Company
- Policy Type (e.g., group, term, whole, accident)
- Beneficiary

Insurance Company	Policy Type	Beneficiary

ASSETS - RETIREMENT PLANNING

For each field, please indicate the following:

- Type of Plan (e.g. 401(k), 403(b), 457, SEP IRA, Traditional IRA, Roth IRA)
- Company
- Approximate value
- Beneficiary

Type of Plan	Company	Approximate Value	Beneficiary



ASSETS - ANNUITIES

For each field, please indicate the following:

- Issuing company
- Annuitant
- Beneficiary

Issuing Company	Annuitant	Beneficiary

ASSETS - MARKETABLE SECURITIES

Please identify brokerage accounts, mutual fund accounts, stocks, bonds, etc.

Marketable Security 1: _____

Marketable Security 2: _____

Marketable Security 3: _____

Marketable Security 4: _____

Marketable Security 5: _____



ASSETS - CLOSELY-HELD BUSINESS INTERESTS

Please identify any interests in a corporation, limited liability company, partnerships, etc.

Interests 1: _____

Interests 2: _____

Interests 3: _____

Interests 4: _____

Interests 5: _____

FIDUCIARIES

Are you interested in making any changes to your Trustees? As a reminder, your Trustee is the person who will administer any trust after your death or incapacity.

Are you interested in making any changes to your Personal Representative? As a reminder, your Personal Representative is the person who will administer your probate estate, if any, following your death.

Are you interested in making any changes to your chosen Funeral Representatives? As a reminder, your Funeral Representative is the person who will make burial decisions after your death.

Are you interested in making any changes to your Financial Power of Attorney? As a reminder, your Financial Power of Attorney is the person who will make financial decisions for you if you are alive but become incompetent.

Are you interested in making any changes to your Healthcare Power of Attorney? As a reminder, your Healthcare Power of Attorney is the person who will make decisions regarding your health for you if you are alive but become incompetent.



THE TGQ LAW FIRM
ATTORNEYS & COUNSELORS AT LAW
Serving the community for over 10 years

Are there any questions or concerns that you would like to address during our meeting?

Please indicate any specific questions or concerns below: