

WILL THIS SEND MY FAMILY TO COURT? CHECKLIST

USE THIS CHECKLIST TO REVIEW YOUR ESTATE PLANNING DOCUMENTS AND DECISIONS. IF YOU ANSWER "NO" TO ANY OF THESE, IT MIGHT INCREASE THE RISK OF FAMILY DISPUTES AND COURT INVOLVEMENT.

01	DOES YOUR WILL CLEARLY NAME BENEFICIARIES FOR ALL MAJOR ASSETS?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
02	ARE THERE DETAILED INSTRUCTIONS FOR DIVIDING PROPERTY, INCLUDING SENTIMENTAL ITEMS?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
03	HAVE YOU AVOIDED VAGUE LANGUAGE LIKE "TO BE DIVIDED FAIRLY"?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
04	DID YOU REVISE YOUR WILL AFTER MARRIAGE, DIVORCE, BIRTH OF CHILDREN, OR DEATH OF A BENEFICIARY?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
05	ARE ALL NAMED PERSONAL REPRESENTATIVES STILL WILLING AND ABLE TO SERVE?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
06	DO ANY BENEFICIARIES HAVE A HISTORY OF DISPUTES OR STRAINED RELATIONSHIPS?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
07	HAVE YOU COMMUNICATED YOUR PLANS CLEARLY TO FAMILY MEMBERS?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
08	IS THE PLAN YOU COMMUNICATED TO YOUR FAMILY THE SAME AS THE WRITTEN DOCUMENTS?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
09	DO YOU HAVE MINOR CHILDREN OR BENEFICIARIES WHO MAY NEED FINANCIAL MANAGEMENT?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
10	WOULD A TRUST PROTECT ASSETS FROM CREDITORS OR DIVORCE?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
11	HAVE YOU NAMED SOMEONE TO MAKE FINANCIAL AND MEDICAL DECISIONS IF YOU BECOME UNABLE?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
12	ARE THESE DOCUMENTS CONSISTENT WITH YOUR WILL AND TRUST?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
13	HAVE YOU REVIEWED ALL YOUR PAYABLE ON DEATH BENEFICIARIES TO ENSURE THEY ARE CONSISTENT?	YES <input type="checkbox"/>	NO <input type="checkbox"/>