



ESTATE PLANNING LIFE CHANGES CHECKLIST™

Has life changed since you created or last reviewed your estate plan?

A LIFE CHANGE DOES NOT AUTOMATICALLY MEAN YOUR ESTATE PLAN NEEDS TO CHANGE.

It simply gives you a reason to look at the plan and confirm that it still reflects your wishes. Check anything that has happened since your plan was created or last reviewed. Write down questions instead of trying to determine the legal effect yourself.

1. FAMILY & PERSONAL CHANGES

LIFE CHANGE	HAPPENED SINCE MY LAST REVIEW	NOTES / QUESTIONS
Marriage or Remarriage Family relationships, responsibilities, and planning priorities may change.	☐	
Divorce or Separation People named in your plan and beneficiary choices may deserve another look.	☐	
Birth or Adoption Consider how a new child, grandchild, or dependent fits into your wishes.	☐	
Death of Someone Named in Your Plan A beneficiary or person chosen for an important role may no longer be available.	☐	
Significant Health or Incapacity Change Healthcare, financial, and decision-making instructions may deserve review.	☐	
Major Change in a Family Relationship Blended-family changes, estrangement, reconciliation, or other relationship changes may affect your wishes.	☐	

2. PROPERTY, FINANCIAL & WORK CHANGES

LIFE CHANGE	HAPPENED SINCE MY LAST REVIEW	NOTES / QUESTIONS
Bought or Sold Real Estate A home, land, rental property, or other real estate changed.	☐	
Moved to Another State A move is a practical time to review your existing plan.	☐	
Major Financial Change Inheritance, sale of property, or a meaningful increase or decrease in assets.	☐	
Started, Bought, or Sold a Business Business ownership or succession circumstances changed.	☐	
Retired Retirement can change accounts, beneficiaries, property, and family priorities.	☐	
Added New Insurance, Annuity, or Retirement Accounts New accounts or policies may need to be coordinated with the rest of your plan.	☐	



3. PEOPLE NAMED IN YOUR PLAN

LIFE CHANGE	HAPPENED SINCE MY LAST REVIEW	NOTES / QUESTIONS
Trustee / Successor Trustee Would you still choose the same person today?	☐	
Financial Decision-Maker Would you still choose the same person to help with financial matters if needed?	☐	
Healthcare Decision-Maker Would you still choose the same person to make healthcare decisions if needed?	☐	
Guardian Choice If guardians are named for minor children, do those choices still make sense?	☐	
Beneficiaries Do the people or organizations named still reflect your wishes?	☐	

4. OTHER REASONS TO REVIEW

LIFE CHANGE	HAPPENED SINCE MY LAST REVIEW	NOTES / QUESTIONS
You Are Not Sure What Your Plan Says If you cannot remember what your documents provide, a review can restore clarity.	☐	
Important Documents Are Hard to Locate The people who may need your plan should be able to find it.	☐	
You Are Unsure Whether Your Trust Is Funded If you do not know whether property and accounts are coordinated with your trust, that question is worth reviewing.	☐	
It Has Been Several Years Even without a major event, periodically confirming that your plan still reflects your wishes can be useful.	☐	

WHAT CHANGED?

The changes or questions I most want to discuss:

NOTHING CHANGED?

That may be good news. A review does not have to result in changes. Sometimes the value is simply confirming that your plan still reflects what you want today.



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BRING THIS CHECKLIST TO YOUR FAMILY LEGACY REVIEW™. We can use the changes you marked and the questions you wrote down as the starting point for the conversation. No assumption that something is wrong. The purpose is to understand whether your existing plan still fits your life.

EDUCATIONAL NOTICE

This checklist is provided for educational and organizational purposes and is not legal, tax, investment, financial, or insurance advice. Individual circumstances vary, and appropriate professional guidance may be needed.