

ASSET REVIEW WORKSHEET™

02 - REVIEW | Does what you have work with the plan you created?

Asset / Account: _____

Institution / Company: _____

Last Four: _____

Current Owner(s): _____

Current Beneficiary Information: _____

WHAT INFORMATION OR INSTRUCTIONS DO I HAVE?

- ☐ My estate plan specifically addresses it.
- ☐ I have trust-funding instructions concerning it.
- ☐ My attorney or estate-planning professional gave me instructions.
- ☐ I believe I know what should happen, but I need confirmation.
- ☐ I don't know.

Relevant instruction / information: _____

Source of that information: _____

ASSET REVIEW WORKSHEET™ - CONTINUED

WHAT IS THE INTENDED RESULT?

- Current ownership should remain unchanged.
- Ownership / registration may need to change.
- Beneficiary information may need to change.
- Transfer-on-death / payable-on-death arrangement is involved.
- Trust ownership is involved.
- Business ownership records may need attention.
- Real-estate documentation may need attention.
- More information is needed.
- Professional guidance is required.

Intended result: _____

Current setup: _____

DO THEY APPEAR TO MATCH?

- YES - No current action identified.
- NO - Action may be required.
- I DON'T KNOW - Get information or guidance before proceeding.

REVIEW RESULT™

- NO ACTION IDENTIFIED
- ACTION IDENTIFIED
- MORE INFORMATION NEEDED
- PROFESSIONAL GUIDANCE REQUIRED
- CORRECTION REQUIRED

MY NEXT STEP

Next step: _____

Who has the next action: _____

Target / Follow-Up Date: _____

Don't guess. Document the question, identify who can answer it, and make getting that answer your next step.