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## **An Estate Planning Checklist**

Would your estate be in order if you died unexpectedly? Would your family suffer because you hadn't planned? Would your estate have to pay a large amount of estate tax? Would your business be able to continue? Answer these 15 questions to measure how well you have planned for the disposition of your estate. If your answer is "no" to more than two questions, you should probably consult an estate-planning professional soon.

1. Do you have a will?
2. Has your will been updated within the past three years?
3. Do you know your net worth?
4. Do you know the value of your business?
5. Do you know who would acquire ownership of your business if you were to die tomorrow?
6. Do you know who would run your business if you were to die tomorrow?
7. Would your business be likely to survive under the ownership and leadership of the people named in Questions 5 and 6?
8. Do you know how your estate would finance the applicable estate taxes if you were to die tomorrow?
9. Do you know how the new owner of your business would finance its purchase?
10. Has your estate plan been prepared or reviewed by an attorney who specializes in estate planning?
11. Do you have a current Living Will Declaration?
12. Do you have contingent beneficiaries on your life insurance, IRA accounts, 401(k) accounts or 403(b) accounts?
13. Do you know who will make health care decisions on your behalf if you are incapacitated or disabled?
14. Do you know who will make financial decisions on your behalf if you are unable to?
15. Do you sleep well knowing that your estate planning is completed?