Donnellon
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A LEGAL PROFESSIONAL ASSOCIATION

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Checklist

1. I have a Will/Trust
   a. It was done within the last 5 years
   b. It names all of my children as beneficiaries (or names beneficiaries if no children)
      i. It names one Guardian
      ii. It names one Alternate Guardian
   c. It names my current spouse (or names a beneficiary if no spouse)
   d. It names an Alternate Executor
   e. All the people named in my Will are still alive
   f. I still have a good relationship with all the people named in my Will/Trust

2. I have a Power of Attorney
   a. It was done within the last 3 years
   b. It names an Alternate Attorney in Fact

3. I have a Healthcare Power of Attorney
   a. It was done within the last 5 years
   b. I still have a good relationship with all the people named as agents
   c. My agents' information is current

4. I have a Living Will
   a. It was done within the last 5 years
   b. I still have a good relationship with all the people named as agents
   c. My agents' information is current

5. I own property (house, rental property, vacation homes, remote islands, etc.)
   a. I know how my deed is titled
   b. My deed is in survivorship/transfer on death designation/in Trust/LLC
   c. My name is correctly listed/spelled on the deed

6. I have a checking/savings account
   a. It is held jointly with another person
   b. It has a Payment on Death (POD) designation

7. I have a life insurance policy
   a. I have designated beneficiaries listed (primary and contingent)

8. I have an IRA/401(k) plan
   a. I have designated beneficiaries listed (primary and contingent)

9. I have an investment account or other investments
   a. I have designated beneficiaries listed (primary and contingent)

This is a basic checklist; every person and situation is different.

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