

# Estate Planning Checklist- Radix Trustees Limited

So if you are ready, here we go....

Yes	No	Not Sure	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Do you currently have any existing Will or Trust?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have you prepared documents appointing a representative who can make decisions on your behalf in the event of incapacity?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	If you are married or cohabiting, have you taken steps to protect any assets you brought into the relationship?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have you named beneficiaries and alternative beneficiaries for your life insurance policies and other investments?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Are your beneficiary designations up-to-date?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have you provided adequately for your dependants?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	If you have specific wishes regarding your funeral, have you left instructions with your trustee?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have you prepared a medical directive?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have you considered making a planned gift to charity?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	If you have a business, do you have a succession plan to ensure its future?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	If you have children from a previous marriage, does your Will or other documentation ensure any specific bequests for them?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does your spouse/child(ren) know the names and addresses of your professional advisers?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Does your spouse/child(ren) know where to find your financial records, income tax returns, bank accounts, safety deposit box, and insurance policies?
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Have you prepared a detailed record of all your assets and accounts?

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- |                          |                          |                          |   |
|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Have you prepared all the necessary documents (including will, power of attorney for finances as well as for health care) for your estate plan? |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Do you have all the information you need to complete your estate plan?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Is your estate plan integrated with your retirement and tax plan?   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Have you reviewed your estate plan with a professional competent in estate planning?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Do you envision transferring wealth to grandchildren?   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Have you developed a college funding plan for your children?  |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | If you have children from a previous marriage, do your planning documents address your goals for transferring wealth to them?                   |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |   |

So let us say you have finished answering the questions, we will need you to add up your answers. Add up all your 'Yes' answers on one side; then add up your 'Nos' and 'Don't Know' answers on the other side. What is your total 'Yes' and total 'No' and 'Don't Know' answers?

**Score: If the total number of No and Not Sure is between:**

- 0-5:                    You are in good shape, keep up the good work**
- 6-11:                 On the right track but you need to step up**
- 12-20                Pulse – urgent remedial action required. Contact an Estate Planning professional now!**

**RTL comprises Estate Planning Professionals who are willing to come to the rescue. Contact us today and you will be happy you do.**

**Contacts: 07031959889**