# Checklist For Reviewing Your Estate Planning Documents

## Power Of Attorney

Do you have the original?
Is it up to date? (Financial institutions may be unwilling to accept Powers of Attorney over 5 years old
Is it durable or springing? (Is it only effective after determination of incapacity?)
Does it include the power to sell real estate?
Does it include the power to gift?
Are there alternate agents appointed?
Was it prepared in California under California law?

## Advance Health Care Directive

Do you have the original?
Are there alternate agents?
Does the AHCD include end-of-life wishes?
Have you provided a copy to doctor's offices to keep as part of your medical record?

## Last Will & Testament

Do you have original in safe place or know location of the original?
Is there a Letter of Testamentary Intent stating your wishes as to tangible person property (jewelry or art)?
Does Will allow executor/personal representative to access digital assets and e-mail accounts?
Is the Executor you chose, the one you want now?
Are titling and beneficiary designations current on all accounts, consistent with your estate plan?

## Trust

Do you have signed copies of original trust document and all amendments?
Does your Trust include the proper estate tax saving language?
Are your accounts titled properly to maximize these savings?
Are your accounts and real estate assets been retitled into the name of the trust?
Do you have successor trustees named?
Does the trust include retirement benefit language that will allow the beneficiary to retain the stretch payout of benefits over his or her life expectancy?