Berluti McLaughlin & Kutchin LLP
Counsellors at Law

Annual Estate Plan Update

To ensure that your estate plan remains up-to-date and continues to address your intended estate planning goals, please consider the following questions. Answering these questions will help you decide whether you need to schedule an appointment with us to update your plan.

		Yes	No
	Financial Status		
1.	Has your net worth changed significantly since you last modified you estate plan?	☐	☐
2.	Has the overall make-up of your assets (e.g. stocks, IRAs, real property, partnerships, life insurance) changed since you established or last modified your estate plan?	☐	☐
3.	Have you acquired of disposed of a significant asset?	☐	☐
4.	Do you have substantial tax-deferred assets?	☐	☐
5.	Are you the beneficiary of another's estate or have you recently received an inheritance?	☐	☐
	Change in Family Composition or Beneficiaries		
6.	Has your marital status changed?	☐	☐
7.	Are you concerned about leaving an inheritance outright to a beneficiary, and/or would like to restrict a beneficiary's access to his/her inheritance?	☐	☐
8.	Do you have new beneficiaries (e.g. new child, grandchild, etc.), or want to make any additions, omissions or changes to any bequests or beneficiaries?	☐	☐
9.	Has a member of the family or a named beneficiary recently passed away?	☐	☐
10.	Are any of your beneficiaries disabled or receiving public assistance, such as SSI or MassHealth benefits?	☐	☐
	Change in Decision Makers (e.g. guardians, trustees, agents)		
11.	Have there been any significant changes in the lives of your appointed decision makers that would affect their ability to serve on	☐	☐

your behalf?

12. Are there people you would like to have as decision makers who are not listed on your original estate plan documents? ☐ ☐

<u>OTHER CONSIDERATIONS</u>

13. If you have a living/revocable trust, do you need assistance in reviewing whether you have properly transferred legal title to your assets to the living trust? ☐ ☐

14. Do you want to make lifetime gifts to your children, grandchildren, relatives or friends for their education or other endeavors, or for your own tax considerations? ☐ ☐

15. Are you interested in making charitable gifts during your life or at death? ☐ ☐

16. Are you considering transfer of assets to qualify for Medicaid to cover the costs of nursing home care? ☐ ☐

If you answered "yes" to one or more of these questions, we encourage you to call our office at (617) 557-3030 to schedule an appointment.