

15 Trust Update Questions

1. Have you had significant changes in your family?
2. Have you moved since you last updated your estate planning documents?
3. Has anyone died or is no longer able to accept a role that you appointed them to do in your estate plan?
4. Has anyone changed their name since your documents were created?
5. Are all of your bank accounts and investments titled correctly to avoid probate?
6. Are your retirement accounts such as IRAs and 401ks correctly designated?
7. Is all of your real estate titled in the trust?
8. Do you have any business interests? Are they assigned to your trust?
9. Have any of your beneficiaries had a life change such as suffering a disability, a bad marriage or addiction issue that causes you to question whether they should receive an outright inheritance?
10. Have you designated alternative beneficiaries if something happens to your primary beneficiaries?
11. Are the people you named as powers of attorney or trustees still appropriate choices and in the correct order?
12. Have your views changed about health care or life support decisions since you last signed your documents?
13. Have you documented your access to online accounts?
14. Have you made a list of personal property that you want distributed upon your death?
15. Does your family know your wishes regarding funeral arrangements?