An Estate Planning Checklist

The following list identifies some of the leading attributes and best practices of a successful, estate plan. Your ultimate goal is to be able to answer "Yes" to these questions.

Please use this list as a guideline to identify strengths and areas that need attention. If you submit this checklist, our team will connect with you to address how we can assist you in successfully establishing an estate plan.

If you are uncertain whether to answer "yes" or "no" to any of these checklist questions, please tick the "not sure" box and we will be happy to discuss them with you.

Contact Information	
First Name	
Last Name	
Email	
Telephone	

General			
	Yes	**No**	**Not Sure**
1. Do you have a properly drawn up Will and have you reviewed it in the last 12 months?	☐	☐	☐
2. Does your Will reflect your current wishes? Does it deal with the property you intend to keep in your family, donations you intend to make and other considerations with respect to your property?	☐	☐	☐
3. Is the executor of your Will aware of all the assets that will come under their control and your wishes with respect to distribution of those assets?	☐	☐	☐

4. Have you assigned a power of attorney with respect to your personal care and financial decisions?	☐	☐	☐
5. Does your current estate plan take into consideration issues related to your desire to retain privacy related to asset ownership and distributions to heirs, addressing potential risk of Wills variation action by heirs and probate fee cost minimization strategies?	☐	☐	☐
6. Have you quantified the tax liability that will arise upon your death?	☐	☐	☐
7. Do your insurance policies meet your family's financial needs?	☐	☐	☐
8. If you have a disabled dependant have you made adequate considerations for him/her in your Will?	☐	☐	☐
9. Do you have a household balance sheet identifying each asset, the current value, the type of ownership of each asset (joint/tenants in common etc.) and the debt associated with each asset?	☐	☐	☐
10. Are you over 65 and considered whether an Alter-Ego or Joint Partner Trust would be beneficial to minimize probate fee costs and to provide for a personalized plan to distribute specific estate assets to your chosen heirs?	☐	☐	☐
11. Have you used your capital gains exemption?	☐	☐	☐

Individuals Who own Shares of Private Companies			
	Yes	**No**	**Not Sure**
1. Have you undertaken an estate freeze to minimize or determine the tax liability upon your passing?	☐	☐	☐
2. Do you have a shareholders’ agreement addressing the consequences of a shareholder passing away?	☐	☐	☐
3. Does the company have enough liquidity to help your family address the tax burden on your passing?	☐	☐	☐
4. Do you have a plan to avoid the double taxation on your private company shares upon your passing?	☐	☐	☐

SUBMIT