ESTATE PLANNING CHECK-UP

TOMAC & TOMAC
The Elder Law & Estate Planning Firm

Asset Protection:

What if you or your spouse have to go to the Nursing Home?

	Yes	No
If you or your spouse end up in the nursing home, will you have to spend all of your assets to pay your nursing home bills?	☐	☐
Do you have long-term care insurance?	☐	☐
Have you taken any actions that will make it difficult for you to qualify for nursing home Medicaid?	☐	☐
Have you permitted a family member to add you to their bank account?	☐	☐
Have you added a child's name to your house or bank account?	☐	☐
Have you gifted any money to children/grandchildren in the past 5 years?	☐	☐

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Asset Distribution:

After Death

	Yes	No
Do you understand which assets will go through probate when you die and which won't?	☐	☐
Are you confident that your family won't have to go through probate when you die?	☐	☐
Have you created a plan where your children's inheritance is protected from divorce, lawsuit, bankruptcy, etc.?	☐	☐
Do you have a beneficiary with special needs or who struggles with addiction?	☐	☐
Are you confident that the beneficiary designation on your life insurance/ investment accts "work with" your overall Estate Plan?	☐	☐

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Asset Management:

When you are Incapacitated

	Yes	No
Do you have a financial POA?	☐	☐
Do you know where it is?	☐	☐
Did you sign it less than 2 years ago?	☐	☐
Are you confident that your POA gives your agent the right powers, not too many, and not too few?	☐	☐
Is the person you named as your Agent alive and well?	☐	☐
Is the person you named as your Agent still who you want to manage your assets when you are incapacitated?	☐	☐
Do you have a backup Agent named?	☐	☐

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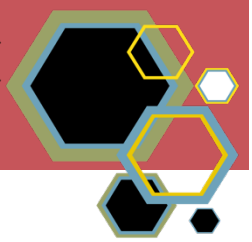

Healthcare Management:

When you are Incapacitated

	Yes	No
Do you have a healthcare POA?	☐	☐
Do you know where it is?	☐	☐
Did you sign it less than 2 years ago?	☐	☐
Are you confident that your POA gives your agent the right powers, not too many, and not too few?	☐	☐
Is the person you named as your Agent alive and well?	☐	☐
Is the person you named as your Agent still who you want to make healthcare decisions for you when you are incapacitated?	☐	☐
Do you have a backup Agent named?	☐	☐