

KRUGLER LAW ESTATE PLANNING CHECK-UP:

General Estate Planning

- Do you currently have a valid and up-to-date Will in place?
- Does the total gross value of your assets exceed \$100,000, and do you have a comprehensive Estate Plan in effect?

Guardianship and Minor Children

- If you have minor children, have you designated Guardians in your Will?
- Are your planning documents specific about the distribution of personal property, including the care of any surviving pets, after your passing?
- Have you had children or grandchildren since your estate planning documents were last updated?

Trusts and Asset Management

- If you have a Living Trust, have you successfully transferred your assets into it?
- If you have a Living Trust, are Medicaid triggers in place to facilitate timely implementation of Medicaid planning when needed?
- Have you bought or sold any real estate or other valuable property since your planning documents were signed?
- Are you considering the sale of stocks or other assets with a low-cost basis?

Financial and Medical Management

- In the event of your disability, have you appointed someone to manage your financial affairs?
- Is your Health Care Power of Attorney current and does it provide the necessary information about your designated agents for medical care during disability?

Changes in Personal Circumstances

- Since the execution of your planning documents, have you reconsidered any aspects of your estate plan?
- Have the value of your assets significantly changed since the execution of your planning documents?
- Have you substantially altered the types of assets you own since the execution of your planning documents?
- Have you experienced recent marital changes, such as marriage, divorce, or becoming widowed, since your planning documents were signed?
- Has there been any change in the marital status of your children since the execution of your planning documents?
- Have you, your spouse, or your children faced physical or mental incapacitation since the execution of your planning documents?
- Have you relocated between states since your planning documents were signed?