RaniaCombsLaw PLLC

WILL REVIEW ANNUAL CHECKLIST

Use this checklist at least once a year and after any major life event or account/property change.

☐ Last reviewed on: _____________ ☐ Next review scheduled: _____________

1. BENEFICIARIES

☐ Primary beneficiaries still reflect your wishes
☐ Specific gifts (home, account, heirlooms) still exist and are described accurately
☐ Backup plan is clear if a beneficiary dies or disclaims

2. FIDUCIARIES — DECISION-MAKERS

☐ Executor/Personal Representative is still appropriate and willing
☐ At least one alternate is named and willing
☐ Contact info for fiduciaries is current (phone/email/address)

3. MINORS & VULNERABLE BENEFICIARIES

☐ Will creates a trust for minors, if any
☐ Any beneficiary with special needs is provided for with a Special Needs Trust
☐ Trustees (and alternates) for any testamentary trust are appropriate

4. GUARDIANS (IF APPLICABLE)

☐ Guardian(s) of the person are correctly named and still appropriate
☐ Guardian(s) of the estate (or trust structure) are covered
☐ Alternates are named and willing to serve as guardians

5. INCAPACITY DOCUMENTS

☐ Financial Power of Attorney agent and alternate are current and appropriate
☐ Medical POA/Advance Directive reflects current wishes
☐ Contact information of agents in documents is still current

6. NON-PROBATE ASSETS — BENEFICIARY DESIGNATIONS

(These pass outside your will. Make sure they align with your Will or any diversion from your Will is intentional)

☐ Retirement (IRA/401(k)): primary & contingent beneficiaries current
☐ Life insurance/annuities: primary & contingent beneficiaries current
☐ Bank/brokerage with POD/TOD: designations don't unintentionally conflict with will/trust terms.
☐ Real estate with any TOD deed matches your overall plan
☐ Copies of beneficiary confirmations are saved with your estate binder

7. DIGITAL ASSETS & ACCESS

☐ Ensure lawful access for fiduciaries
☐ Maintain an updated password manager with emergency access for your trustee/agent.
☐ Document locations/credentials for crypto or hardware wallets

8. EMERGENCY READINESS

☐ Original estate planning documents are safely stored; someone you trust knows where they are
☐ Contact list for attorney, fiduciaries, CPA, and advisor is up to date

9. TRIGGERING EVENTS THAT REQUIRE ATTORNEY REVIEW

☐ Marriage/divorce or death of a family member
☐ Birth/adoption
☐ Move to a new state
☐ Buying/selling/refinancing real estate
☐ Opening/migrating accounts
☐ Starting a business
☐ Receiving an inheritance
☐ Passage of time (2-3 years have elapsed)