MVP LAW GROUP, APC
Estate Planning | Woodland Hills, California | (818) 788-7881

Estate Plan Review Checklist

Has anything changed since you signed your plan?

Work through the list below. If you check even one box, it is worth a short call. Changes in your family, your assets, or your wishes can all affect whether your documents still do what you intended.

Client Name(s): _____

Living Trust Date: _____

Date of Review: _____

Family Changes

- ☐ Married
- ☐ Divorced or legally separated
- ☐ Birth or adoption of a child
- ☐ Birth of a grandchild
- ☐ Death of a spouse, beneficiary, trustee, or other family member
- ☐ Change in beneficiary wishes
- ☐ A child turned 18
- ☐ A family member developed a disability or special need
- ☐ Other family changes: _____

Asset Changes

- ☐ Purchased a primary residence
- ☐ Sold a primary residence
- ☐ Purchased or sold a rental property
- ☐ Purchased a vacation or second home
- ☐ Acquired property in another state
- ☐ Opened new bank, brokerage, or investment accounts
- ☐ Started a new business
- ☐ Sold or closed a business
- ☐ Significant increase or decrease in assets
- ☐ Received an inheritance
- ☐ Refinanced a property held in the trust
- ☐ Changed or added a retirement account or life insurance policy
- ☐ Other asset changes: _____

Estate Planning Changes

- [ ] Wishes to change Trustee
- [ ] Wishes to change Successor Trustee
- [ ] Wishes to change Executor or Personal Representative
- [ ] Wishes to change beneficiaries
- [ ] Wishes to change Guardian nominations for minor children
- [ ] Wishes to change Durable Power of Attorney
- [ ] Wishes to change Advance Health Care Directive or Health Care Agent
- [ ] Wishes to update specific gifts or distributions
- [ ] Other estate planning changes: _____

If you checked anything

We recommend scheduling an Estate Plan Review. A review lets our attorney confirm whether an update or amendment is appropriate so your documents keep doing what you intended. If nothing needs changing, we will tell you that too.

Call (818) 788-7881 or book a review at MVPLawLA.com

Notes