GENERATION LAW
Protecting your family's future

2023 ESTATE PLAN CHECK-UP

Please review this list of items which may have changed since you completed your Estate Plan.

- ❑ Birth or adoption of a family member
- ❑ Death of a family member or successor trustee
- ❑ Marriage within the family
- ❑ Divorce within the family
- ❑ Retirement in the family
- ❑ Serious or long-term illness within the family
- ❑ Significant increase or decrease in assets – especially if your estate is now worth more than $4,000,000 (including retirement & life insurance)
- ❑ Property was acquired or sold in Illinois and/or another state
- ❑ Change in primary residence
- ❑ Change in contact information, including mailing address, email address, home/work/cell phone
- ❑ Change in insurability or insurance
- ❑ Change in employment and/or employment/retirement benefits
- ❑ Change in business interests, partnerships, corporations
- ❑ Changes in agents for powers of attorney for healthcare and/or property
- ❑ Changes in guardianship for children
- ❑ Other significant changes to wishes, family or finances
- ❑ A review of the beneficiaries on life insurance policies and retirement accounts
- ❑ If you have a trust, make sure all non-retirement assets are held in the name of the trust (if you need help determining this send us an account statement and we will help)
- ❑ If your trust or a will that your trust creates is the beneficiary of a retirement account, review any IRA Conduit Trust language for compliance with 2019 SECURE Act.
- ❑ Have you written down all of your online passwords so that someone has access to them if something happens to you?

*If you checked any of those boxes, or have questions about any of the listed items, please give us a call at **630-782-1766** or drop us a line at **info@GenerationLaw.com** to let us know how we can help you.*