

2025 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.*