FOR TAX & FINANCIAL PROFESSIONALS

# Annual Estate Planning Check-Up

*Walk through this with clients during their annual tax review and preparation. A single "yes" doesn't mean a client needs a new estate plan — it means the conversation is worth having.*

**CLIENT NAME** _____ **REVIEW DATE** _____

## FAMILY CHANGES

- ☐ Married, divorced, or widowed this year
- ☐ Birth, adoption, or child reaching adulthood
- ☐ Death in the family or among beneficiaries
- ☐ New blended-family situation

## ASSET & OWNERSHIP CHANGES

- ☐ Bought or sold real estate
- ☐ Acquired an investment property
- ☐ Received an inheritance
- ☐ Net worth changed significantly

## BENEFICIARY DESIGNATIONS

- ☐ Retirement accounts not reviewed recently
- ☐ Life insurance beneficiaries unclear or outdated
- ☐ Designations may not match the trust or will

## TRUST & ESTATE PLAN

- ☐ Plan hasn't been reviewed in 3+ years
- ☐ Client moved to (or from) another state
- ☐ Named trustee, executor, or agent no longer fits

## TAX & ESTATE INTERSECTION

- ☐ Taxable estate has changed materially
- ☐ Gifting or charitable planning opportunity
- ☐ Client is serving as trustee/executor for someone else

## BUSINESS & RETIREMENT

- ☐ Business started, sold, or grown substantially
- ☐ No buy-sell or succession plan in place
- ☐ Client is approaching retirement

**Checked a box?**
*"This might be worth a conversation with an estate planning attorney — I work with Legacy, APC, and I'm happy to introduce you."*

## BEFORE YOUR CLIENT LEAVES

- ☐ Discussed this with the client
- ☐ Gave them Page 2 to take home

*Page 2 is already written for your client — hand it over and let them take it from there.*

A NOTE FROM YOUR TAX PROFESSIONAL

# Worth a Conversation

*While reviewing your taxes this year, a few things came up that are often worth a conversation with an estate planning attorney. That doesn't mean anything is wrong — it just means now may be a good time for a closer look. Use the space below to note what stood out, so you're ready when you call.*

## WHAT CAME UP FOR YOU

**What changed for you or your family this year?**

**What would you like more clarity on?**

**Questions you want to ask when you call**

## A Free Consultation, Just for You

**PROVIDED BY**

As a client of the firm named above, you're entitled to a free, no-obligation consultation with Legacy, APC. Just mention this page when you call.

**Legacy, APC**

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*When you call, mention what you wrote above — it helps us make the most of our time together. There's no rush, but we're here whenever you're ready.*

*This page is for your reference and does not constitute legal or tax advice.*