QUICK SELF-ASSESSMENT

LEGACY PROTECTION CHECKLIST

Are your estate documents, beneficiaries, and legacy wishes current?

✓

Clarity today. Confidence tomorrow. Freedom for the future.

A practical checklist from Scott Martin, CFP®

LEGACY PROTECTION CHECKLIST

Are your estate documents, beneficiaries, and legacy wishes current?

This checklist helps you review whether your estate plan, beneficiaries, and legacy strategy still reflect your current life and wishes.

Estate Documents

- ■ I have an updated will.
- ■ I have a durable power of attorney.
- ■ I have a HIPAA authorization.
- ■ I have reviewed whether a trust is appropriate.
- ■ I have a healthcare directive.
- ■ My documents have been reviewed within the last three years.

Beneficiaries

- ■ IRA beneficiaries are current.
- ■ Life insurance beneficiaries are current.
- ■ Bank and brokerage account beneficiaries have been reviewed.
- ■ 401(k) or retirement plan beneficiaries are current.
- ■ Annuity beneficiaries are current.
- ■ Contingent beneficiaries are named.

People & Roles

- ■ I have named an executor or personal representative.
- ■ I have named healthcare decision-makers.
- ■ My chosen people are still willing and able to serve.
- ■ I have named trustees where needed.
- ■ I have discussed key wishes with appropriate people.
- ■ Important documents are accessible if needed.

CONTINUE YOUR SELF-ASSESSMENT

Use this page to identify gaps that may deserve further review.

Legacy Strategy

- ■ My estate plan reflects my current family situation.
- ■ Tax implications have been reviewed.
- ■ My plan coordinates with insurance and retirement accounts.
- ■ My charitable wishes are documented.
- ■ Asset titling has been reviewed.
- ■ I have considered how I want to be remembered.

SELF-ASSESSMENT SCORE

Total boxes checked:	___________ out of ___________
Confidence level:	■ Strong ■ Somewhat confident ■ Unsure ■ Concerned
Top 3 items to review:	1. ______________________ 2. ______________________ 3. ______________________

WHAT YOUR ANSWERS MAY MEAN

A checklist does not replace planning. It helps reveal where your plan may need attention.

Legacy planning is not only about money. It is about control, clarity, family protection, and making sure your wishes are honored. Unchecked items may indicate that your plan no longer reflects your current life.

COMMON BLIND SPOTS

- Outdated beneficiaries.
- Estate documents that no longer match your wishes.
- Not coordinating account titling with the estate plan.
- Forgetting healthcare and incapacity planning.
- Assuming loved ones know what to do.

NEXT STEP

If several items were unchecked, the issue may not be effort - it may be that your financial plan has not been fully recalibrated around your current life stage, goals, risks, and future income needs.

Schedule Your Confidential Consultation
30-minute discovery conversation
No obligation. Just a conversation that could help reveal what needs attention.

Book online: Click Here to schedule a Consultation