

Divorce Estate Plan Review

Did you know...

Divorce affects most estate planning you may have done. Divorce removes your ex-spouse from most positions of authority, such as the Executor of your will, or Agent under your Durable Power of Attorney

Considering divorce? It is now time to make new plans. You need to plan who will raise your minor children if you are unable to do so. What values are important to you? Does your child's guardian have instructions to impart your values to your children?

How will they spend your life insurance money? What will happen to the house? You should determine who will make these decisions if you are disabled. You should decide who you want to manage your "stuff" if you pass away. Make a plans to protect your minor children from creditors and financial predators. You sure don't want the government to step in!

Take a few moments to complete this Estate Plan review. If you have any questions, contact an Estate Planning Attorney.

Healthcare Concerns

I have an updated Immediate Advance Health Care Directive which names individual(s) who are willing to make my healthcare decisions in my behalf in the event I become disabled.	YES NO UNSURE
I have an updated Immediate Durable Power of Attorney which names individual(s) who are willing to make financial decisions in my behalf in the event I become disabled.	YES NO UNSURE
I have updated my HIPAA medical information release form.	YES NO UNSURE
My Revocable Living Trust is in place as part of my estate plan; it gives my trustee instructions caring for me and my minor children.	YES NO UNSURE
I have updated my will and trust by naming an executor/successor trustee in my estate plan.	YES NO UNSURE
My estate plan clearly states that my needs, and my minor children are the first priority.	YES NO UNSURE

Family Concerns

I took steps to avoid, to the extent possible, trust and/or will contests and disputes at death.	YES NO UNSURE
I took steps to protect my children's inheritance in the event the I, or my ex-spouse, re-marry.	YES NO UNSURE
I recently checked the beneficiary designations of all retirement plans and life insurance policies , and I am confident that neither my estate, my ex-spouse, nor my minor children are listed as primary or contingent beneficiaries.	YES NO UNSURE
My estate plan provides both creditor and lawsuit protection for assets passed to my children.	YES NO UNSURE
My estate plan shields my children's inheritance from claims of <i>their</i> divorcing spouse.	YES NO UNSURE
My current plan maximizes income tax planning .	YES NO UNSURE
I am satisfied that my current plan would protect the special needs of a disabled child .	YES NO UNSURE
I am certain that my estate plan will minimize possible taxes at my death, including taxes on the house, life insurance and IRA's.	YES NO UNSURE
My Revocable Living Trust is fully funded so my family will avoid unnecessary delay and expense of probate.	YES NO UNSURE

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