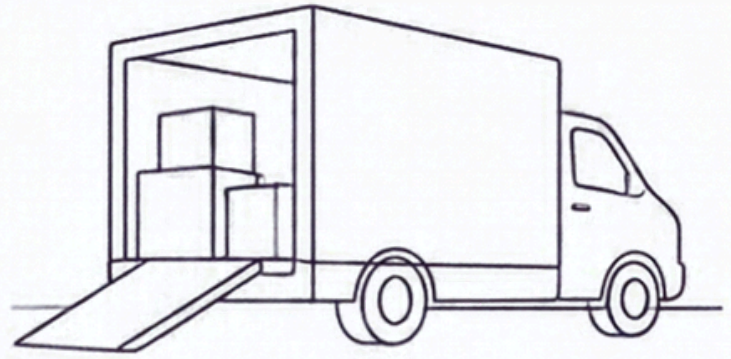


What's In Your Moving Van?



Your trust is the moving van; but it only helps with the things that actually make it inside.

What do I own that needs to be part of my plan?

- ☐ Home/real estate
- ☐ Bank accounts
- ☐ Retirement accounts
- ☐ Investments
- ☐ Life insurance
- ☐ Vehicles/titled property
- ☐ Business interests
- ☐ Valuable personal property
- ☐ Other: _____
- ☐ Other: _____

Questions I need to ask: Is it owned by my trust? Does it have a beneficiary? Is that beneficiary still who I want? What happens to it when I die?

Will My Plan Survive Real Life?

Life changes. Has yours?

-
- ☐ Marriage/divorce/Remarriage
 - ☐ Death of spouse or beneficiary
 - ☐ New children/grandchildren
 - ☐ Major change in assets
 - ☐ Someone named can no longer serve
 - ☐ Family relationships changed
 - ☐ It has been several years since I reviewed my plan
 - ☐ _____
 - ☐ _____
-

If something happened to me tomorrow:

The person who would be responsible for handling things is...

The thing I'm least certain about is...

One question I need answered after today is...

Lightbulb Realization

Something I heard today that I don't want to forget:
