



Beginning of the Year Estate Planning Review Checklist

A new year is a great time to confirm that your estate plan still reflects your wishes and protects the people you care about. Use this checklist to guide your review.

Cornerstone Legal is here to guide you through each step and help you start the year with a solid, confident plan.

Contact us at (517) 708-2222 or email Katrina@CornerstoneLegalPLLC.com.

1. Family Updates

- ☐ Marriage or divorce
- ☐ Birth or adoption
- ☐ Death in the family
- ☐ A loved one who now needs more support
- ☐ A new person you want to include or remove

2. Beneficiary Designations

- ☐ Retirement accounts
- ☐ Life insurance policies
- ☐ Payable-on-death accounts
- ☐ Any accounts with listed beneficiaries

3. Decision-Makers

- ☐ Financial Power of Attorney
- ☐ Medical Power of Attorney
- ☐ Trustees
- ☐ Personal Representatives
- ☐ Confirm they are still willing and able to serve

4. Financial and Asset Changes

- ☐ Bought or sold property
- ☐ Opened or closed a business
- ☐ Significant changes to investments or savings
- ☐ New debts or major financial shifts

5. Personal Wishes

- ☐ Inheritance wishes
- ☐ Guardianship choices
- ☐ Charitable gifts
- ☐ Medical care preferences
- ☐ Instructions for sentimental items

6. Document Storage

- ☐ Your documents are stored safely
- ☐ Your trusted agents know where to find them
- ☐ You have updated copies if anything changed

7. Questions to Bring to Your Attorney

- ☐ Does anything feel unclear
- ☐ Do any instructions feel outdated
- ☐ Do you need help deciding how to handle new assets or life changes

Building your foundation. Building your confidence.