



# The Rains Law Firm

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## Estate Planning Deficiencies Checklist

**If you answered “No” or “Don't Know” to any of the questions, complete the bottom of this form and we will contact you to schedule a complimentary consultation. By returning this form, you agree to allow The Rains Law Firm to contact you about your results and to schedule a follow-up complimentary meeting.**

Circle One

- |  |     |    |            |
|--|-----|----|------------|
| Do you have a Will or a Trust in place?  | Yes | No | Don't Know |
| Has your Will or Trust been reviewed in the last two years?  | Yes | No | Don't Know |
| Does your estate plan contain a customized plan to determine if you are mentally disabled?                                     | Yes | No | Don't Know |
| Does your current estate plan give instructions for your care and the care of your loved ones in the event of disability?      | Yes | No | Don't Know |
| If you have a Revocable Living Trust in place as part of your estate plan, is your trust fully funded?                         | Yes | No | Don't Know |
| Have you taken steps to avoid possible will contests and disputes during the administration of your estate?                    | Yes | No | Don't Know |
| Does your estate plan protect your children's inheritance in the event your surviving spouse chooses to remarry?               | Yes | No | Don't Know |
| Have you recently checked the beneficiary designations of your retirement plans and life insurance policies?                   | Yes | No | Don't Know |
| Does your current estate plan provide creditor and lawsuit protection for assets passed to your surviving spouse and children? | Yes | No | Don't Know |
| Are you confident that your current estate plan is income tax efficient?   | Yes | No | Don't Know |
| Does your current plan protect your children's inheritance from a divorcing spouse?  | Yes | No | Don't Know |
| Are you satisfied with the persons you named as guardians of your minor children in your current plan?                         | Yes | No | Don't Know |
| Are you satisfied with the persons selected as executor and trustee in your current estate plan?                               | Yes | No | Don't Know |

Your Name: \_\_\_\_\_

Date: \_\_\_\_\_

Email Address: \_\_\_\_\_

Phone: \_\_\_\_\_