DAVIS SCHILKEN, PC

LAW OFFICES

ClientCare Plan™ Checklist

NAME: ________________________ **DATE:** ____________

		Problem	No Problem	Unknown or Not Applicable
1.	Does your current plan include a provision to minimize or eliminate the Federal Estate Tax? Is each spouse's unified credit being utilized?	☐	☐	☐
2.	Do you have a current and properly drafted Financial Power of Attorney? The trust or will cannot solve all problems relating to the need for your signature. Many times a Power of Attorney is the only method of acting for an incapacitated person.	☐	☐	☐
3.	Is your Health Care Power of Attorney current? Unlike a Financial Power of Attorney, this gives your agent the authority to make medical decisions on your behalf when you are not able.	☐	☐	☐
4.	Do you have a plan to keep your Powers of Attorney and other legal instruments current? Powers of Attorney are notorious for being outdated and useless. You must have a system for making sure they are current.	☐	☐	☐
5.	Do you have a system that will permit you to access your Powers of Attorney quickly during an unanticipated crisis? The Advance Health Care Directive is needed in an emergency and since it is not readily available, it is often replaced by an inferior version at the hospital.	☐	☐	☐
6.	Does your current planning provide an alternative to doctor or court determination of your incompetency/incapacity? Very often, a federal act known as "HIPAA" prevents doctors from making this determination. Consequently, a court determination is often necessary.	☐	☐	☐
7.	Does your current planning provide for assistance to you and or your spouse in the event of a temporary emergency? Successor agents can be secured to deal with asset, estate and business issues that arise when you are hospitalized, ill or simply out of town.	☐	☐	☐
8.	Does your planning provide for assistance to you, in the event a temporary emergency becomes permanent? If the temporary emergency evolves into a permanent disability, a "disability agent" is necessary to meet the needs of the disabled individual.	☐	☐	☐
9.	If you have A/B planning (Decedent/Survivor trusts or Marital/Family trusts), does it protect the surviving spouse from creditors and predators? Provisions need to be included in your planning to allow the surviving spouse access to the deceased spouse's estate, while reducing the ability for the rest of the world to access this estate.	☐	☐	☐
10.	If you have A/B planning, does it provide protection for the deceased spouse's estate in the event the surviving spouse remarries? The deceased spouse's estate can be controlled and protected even if the surviving spouse remarries.	☐	☐	☐
11.	Does your current planning protect your children's inheritance from financial disasters, such as divorce, bankruptcy or lawsuits? Without the proper provisions in your planning, a beneficiary's inheritance can be accessed by creditors or depleted by a divorcing spouse.	☐	☐	☐
12.	Does your current planning transfer the estate, tax free, to your grandchildren upon your child's death? A large portion of the estate can transfer estate tax free from your child to your other child, children or grandchildren. This is a little used but very powerful asset transfer technique.	☐	☐	☐

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