

## YOUR PERSONAL LEGAL CHECKLIST

This checklist is intended to highlight some important legal issues and to help you keep your personal affairs in order.

	<u>Yes</u>	<u>No</u>	<u>Not sure</u>
1. Has your will been revised within the past three years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has anything changed that might require revisions in your estate planning?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Have you reviewed the beneficiary designations on all your relevant documents (wills, insurance, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is your employment or partnership contract up to date?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Is your insurance coverage adequate (life, vehicle, liability--both personal and professional, disability, umbrella, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Do you have any liability or financial issues that are insurable but are not presently covered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Have the limits of your liability insurance policy changed in the last 3 years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Are there any potential claims that could be made against you?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Do you keep a current list of expiration, option, maturity and due dates?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Do you have a list of all your credit cards with expiration dates and customer contact information?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Are you aware of all government benefits to which you may be (or become) entitled?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Have you checked up on your Social Security status in the last five years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Do you have a safe, fireproof file containing all your important documents (wills, titles, deeds, securities, contracts, marriage/divorce papers, pension/profit-sharing plans)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Do you have a current financial statement that lists all your assets and liabilities?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
15. Do you have a complete, current list of all your personal valuables, to support a claim in case of loss?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Are there any people for whom you have responsibilities that should be addressed in any of the documents listed above (spouse, children, aging parents, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>