

Estate Planning Self-Evaluation

1. I have estate planning documents that were validly executed. *(Signed in the proper manner, attested by valid witnesses, self-proved, properly notarized, etc.)*
 Yes No Not Sure
2. My estate documents were fully implemented, coordinated with beneficiary designations, and funded so that they are actually effective when I am gone.
 Yes No Not Sure
3. My will contains a residuary clause (to avoid the possibility of partial intestacy).
 Yes No Not Sure
4. I have legally designated guardians for my minor children.
 Yes No Not Sure N/A
5. My family and life situation are unchanged since my estate documents were last reviewed (marital status, birth/death of loved one, recent move, need privacy, kids are no longer minors, financial changes, etc.).
 Yes No
6. Children from any prior marriage or relationship are accounted for in my estate planning to avoid the possibility of accidental disinheritance.
 Yes No Not Sure N/A
7. My estate plan provides protection to my children from creditors, financial predators, and the possibility of divorcing in-laws. It also protects assets if my spouse re-marries when I am gone.
 Yes No Not Sure N/A
8. All my family members will be able to handle inheritance responsibly and can take care of themselves without concerns about behaviors, spending, mental health, physical safety, or other special needs.
 Yes No Not Sure N/A
9. I only own property (real estate, etc.) in this state.
 Yes No N/A
10. My only real estate is my primary residence.
 Yes No N/A
11. I believe I will be free from estate taxes when I pass away.
 Yes No Not Sure
12. I already have a family trust, and it is up to date.
 Yes No Not Sure

*If you answered “No” or “Not Sure” to any of the above, you may want to contact an attorney to discuss your situation.

Jeremy Curtis, JD, MS, CFP®

**16300 Katy Freeway, Suite 300
Houston, TX 77094**

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Phone: (713) 940-1244

Email: jcurtis@curtis-law.com

Web: www.curtis-law.com

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