

INSTRUCTIONS

1 LIST YOUR ASSETS. EACH OF YOUR BANK ACCOUNTS, CDs, INVESTMENT ACCOUNTS, INDIVIDUAL STOCKS (NOT IN BROKERAGE ACCOUNTS), LIFE INSURANCE POLICIES, ANNUITIES, PIECES OF REAL ESTATE, ETC. SHOULD BE LISTED SEPARATELY.

2 INDICATE OWNER(S). PROVIDE THE NAME OF THE OWNER OR OWNERS ON EACH ASSET. CHECK STATEMENTS, DEEDS, AND OTHER POLICIES TO CONFIRM OWNERSHIP

3 INDICATE ALL BENEFICIARIES DESIGNATED FOR EACH ASSET. THIS INCLUDES PAYABLE ON DEATH DESIGNATIONS, TRANSFER ON DEATH DESIGNATIONS AND OTHER SIMILAR ARRANGEMENTS. REMEMBER: IN SOME PLANS, NOT ALL ASSETS WILL HAVE A DESIGNATED BENEFICIARY.

4 SHARE THE DESIGNATION THAT YOU HAVE. IT IS IMPORTANT TO DOCUMENT ALL BENEFICIARY DESIGNATIONS. YOU SHOULD SHARE THESE DESIGNATIONS WITH FITZGERALD LAW OFFICE TO PROTECT YOUR PLAN AND ENSURE THAT YOU ACCOMPLISH YOUR GOALS FOR YOUR FAMILY.



Even the best Will, Revocable Trust or Estate Plan can fail because small and seemingly insignificant changes accumulate over time. Fortunately, protecting your plan can be quick and easy. The Estate Planning Watchdog™ will guide you through a thorough, simple review of your estate plan. After completing the Estate Plan Watchdog™ you will be more organized, understand your plan better, and be able to spot issues that you need to focus on to protect your Estate Plan.

THE ESTATE PLAN



WATCHDOG™



FITZGERALD LAW OFFICE

1 MY ASSETS	2 OWNER(S) ON TITLE	3 WHO IS THE DESIGNATED BENEFICIARY?	4 DOES FITZGERALD LAW OFFICE HAVE A COPY OF THE BENEFICIARY DESIGNATION?
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