

Did You Know?

If you don't have a valid will or trust, then state laws will determine who your beneficiaries are, what assets they will receive, what bills will be paid, and when distributions will occur. This could lead to unnecessary estate and income taxes, your estate being consumed by creditors, your estate being tied up in probate court (possibly for years), and many other undesired results. Probate is perhaps the costliest and most emotionally draining way to pass assets to your loved ones.



ESTATE PLANNING CHECK UP

Do you have a Will or a Trust?

Yes No Not Sure

Has your Will or Trust been professionally reviewed in the last two years?

Yes No Not Sure

Do you know if your existing estate plan is compliant with Florida law?

Yes No Not Sure

Are you satisfied with the persons selected as Personal Representative and Successor Trustee in your current estate plan?

Yes No Not Sure

Are you confident your Personal Representative, Agent under a Power of Attorney, and/or Successor Trustee are prepared to act on your behalf when necessary?

Yes No Not Sure

Have you taken steps to avoid possible Will and/or Trust contests and disputes during the administration of your estate?

Yes No Not Sure

Are you certain your current estate plan will minimize federal and state taxes at your death, including taxes on your house, life insurance and retirement accounts?

Yes No Not Sure

If you have a Revocable Living Trust in place as part of your estate plan, is your Trust fully funded so your family can avoid the delays and expenses of probate?

Yes No Not Sure

Estate Planning • Trust Administration • Guardianship • Probate Administration • Tax Disputes
Residential Real Estate • Business Law • Medicaid Preplanning and Crisis Planning



MARSHALL
— LAW, P.A. —



CONTACT US
(352) 432-8859

www.marshalllawpa.com



Does your estate plan contain a customized plan to determine if you are mentally disabled?

Yes No Not Sure

Does your current estate plan give instructions for your care, and the care of your loved ones, in the event of your disability?

Yes No Not Sure

Do you have Advanced Health Care Directives in place permitting the persons of your choosing (Health Care Surrogates) to make your emergency health care decisions if you are unable to do so, while also granting them access to your medical records?

Yes No Not Sure

Do your Advanced Health Care Directives contain contact information for your Health Care Surrogates so they can be reached in an emergency?

Yes No Not Sure

Does your current estate plan provide creditor and lawsuit protection for assets passed to your surviving spouse?

Yes No Not Sure

Does your estate plan protect your children's inheritance in the event your surviving spouse chooses to remarry?

Yes No Not Sure

Does your current estate plan provide creditor and lawsuit protection for assets passed to your children?

Yes No Not Sure

Does your current plan protect your children's inheritance if they are going through a divorce?

Yes No Not Sure

If you have minor children, are you satisfied with the persons named as in your current plan?

Yes No Not Sure

Did you check NO or NOT SURE anywhere on this check up? *If you did* – Call Now for a FREE consultation with John T. Marshall and Marshall Law, P.A. to discuss your estate planning deficiencies.

Want to know why we ask these questions and why your answers are so important?

Check out our explanations at <https://marshalllawpa.com/checkup> today.



John T. Marshall, Esq.

John T. Marshall is a licensed attorney in Florida and Ohio and has a Masters in Taxation. John and has been assisting clients with their estate planning, tax planning, probate and guardianship needs since 2006.



CONTACT US

(352) 432-8859

www.marshalllawpa.com