

Annual Review Checklist

Once the foundation is built, keep it current with a short yearly review

Educational planning resource - not legal, tax, financial, or medical advice. Laws and terminology vary by state. Use this guide to organize your thinking and bring informed questions to qualified professionals.

Review every year and after major life events: marriage, divorce, birth/adoption, death, move, retirement, major diagnosis, business sale, major asset change, or significant relationship change.

- Will still reflects my intended beneficiaries and executor.
- Power of Attorney agents are still appropriate and willing.
- Health care agent and alternates are still appropriate and willing.
- Living Will / treatment preferences still reflect my values.
- Beneficiary designations were reviewed.
- Continuity Inventory reflects current institutions, accounts and contacts.
- Password manager emergency access was tested or reviewed.
- Phone / MFA recovery methods are current.
- Important originals are still where my trusted people expect them to be.
- Business / professional continuity plan is current.
- Digital, social media, domain and subscription inventory is current.
- Creative / intellectual-property records are current.
- Housing, care and long-term-care assumptions still make sense.
- Attorney, tax and financial contacts are current.
- At least one trusted person knows where to start.

Review date

Next review date

Changes / follow-up