



How Do You Actually Review Your Estate Plan?

A Simple Estate Plan Review Checklist for Maine Families

Reviewing your estate plan does **not** mean starting over. It simply means confirming your documents still match your life today. Use this checklist to walk through the review step by step.

Step 1: Gather Your Documents

- Will and any codicils
 - Trust documents and amendments
 - Durable Power of Attorney
 - Health Care Power of Attorney / Advance Directive
 - Written funeral or burial instructions

 - All documents gathered in one place (home file, safe deposit box, attorney's office)
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Step 2: Check the Dates

- Documents are less than **three to five years old**
 - Documents were signed **after** major life events
 - Documents were created **in Maine** or reviewed for Maine law

 - If not, documents need closer review
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Step 3: Review the People You Named

- Executors, trustees, and agents are still alive
 - Individuals named are still trusted
 - Individuals named are still capable and willing to serve
 - Backup (successor) agents or trustees are named
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Step 4: Review Assets and Beneficiaries

- Real estate ownership reviewed
 - New assets added since documents were signed
 - Assets sold or transferred are reflected in the plan
 - Beneficiary designations still align with your wishes

 - Assets properly coordinate with your will or trust
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Step 5: Review Health & Long-Term Care Planning

- Health care wishes still reflect your values
 - Health care agent is still appropriate
 - Long-term care concerns have been considered
 - MaineCare planning has been reviewed or discussed
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Step 6: Watch for Red Flags

- Documents name a former spouse
 - No backup agents or trustees listed
 - Powers of attorney are very limited
 - Trust or will has never been updated
 - Documents were created before major life changes

 - One or more red flags identified
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Step 7: Schedule a Professional Review

- Estate planning or elder law attorney consulted
- Documents reviewed for **current Maine law**
- Long-term care and asset protection considered
- Updates recommended only where needed