

2023 · WHAT ISSUES SHOULD I CONSIDER BEFORE I UPDATE MY ESTATE PLAN?

BENEFICIARY & FIDUCIARY ISSUES	YES	NO
Have any individuals named as beneficiaries or fiduciaries (e.g., Executor, Trustee) passed away?	<input type="checkbox"/>	<input type="checkbox"/>
Are there any individuals (or charitable organizations) that should be added or removed as beneficiaries (primary or contingent)?	<input type="checkbox"/>	<input type="checkbox"/>
Have there been any marriages or divorces that would impact your estate plan?	<input type="checkbox"/>	<input type="checkbox"/>
Is there a beneficiary with special needs receiving government assistance?	<input type="checkbox"/>	<input type="checkbox"/>
Have there been (or could there be) any births that would impact your estate plan?	<input type="checkbox"/>	<input type="checkbox"/>
Do you need to protect any beneficiaries from a divorce, creditor issues, substance abuse or gambling issues?	<input type="checkbox"/>	<input type="checkbox"/>
Do you need to update the appointments under your Powers of Attorney (General and/or Health Care)?	<input type="checkbox"/>	<input type="checkbox"/>
Do you want to update any of your intentions as outlined in your Living Will?	<input type="checkbox"/>	<input type="checkbox"/>

MINORS & CHILDREN RELATED ISSUES	YES	NO
Have any of your children reached age 18 (or the age of majority in your state)? If so, they no longer need to have a guardian or personal representative.	<input type="checkbox"/>	<input type="checkbox"/>
If you have children under age 18, do you need to appoint or change the named Guardians and/or Trustees?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have an adult child who has no spouse or child? If so, consider talking to your child about implementing their own Powers of Attorney (General and Health Care), perhaps appointing you to act on their behalf if they are unable to do so.	<input type="checkbox"/>	<input type="checkbox"/>

OTHER ISSUES	YES	NO
Have there been any changes to state or federal laws since your estate plan was last reviewed?	<input type="checkbox"/>	<input type="checkbox"/>
Are there digital assets that should be preserved?	<input type="checkbox"/>	<input type="checkbox"/>
Are there any state-specific issues that should be considered such as a state estate tax?	<input type="checkbox"/>	<input type="checkbox"/>

ASSETS & PROPERTY RELATED ISSUES	YES	NO
Do you expect your estate will exceed your unused federal estate and gift tax exclusion amount (maximum \$12.92 million, or \$25.84 million if you are married)? If so, consider strategies to plan for a possible federal estate tax liability.	<input type="checkbox"/>	<input type="checkbox"/>
Do you wish to make specific bequests of assets that were not made in the current estate plan?	<input type="checkbox"/>	<input type="checkbox"/>
Have you bought or sold a second residence?	<input type="checkbox"/>	<input type="checkbox"/>
Do you own homes, investment property or tangible property in two or more different states?	<input type="checkbox"/>	<input type="checkbox"/>
Have there been any material changes to your assets (ownership or valuation)?	<input type="checkbox"/>	<input type="checkbox"/>

IMPORTANT DISCLOSURE INFORMATION

Past performance may not be indicative of future results. Different types of investments involve varying degrees of risk. Therefore, it should not be assumed that future performance of any specific investment or investment strategy (including the investments and/or investment strategies recommended and/or undertaken by Evensky & Katz / Foldes Wealth Management), or any non-investment related content, will be profitable, equal any corresponding indicated historical performance level(s), be suitable for your portfolio or individual situation, or prove successful. Evensky & Katz / Foldes Wealth Management is neither a law firm nor accounting firm, and no portion of its services should be construed as legal or accounting advice. Please remember that it remains your responsibility to advise Evensky & Katz / Foldes Wealth Management, in writing, if there are any changes in your personal/financial situation or investment objectives for the purpose of reviewing/evaluating/revising our previous recommendations and/or services, or if you would like to impose, add, or to modify any reasonable restrictions to our investment advisory services. A copy of our current written disclosure statement discussing our advisory services and fees is available upon request. The scope of the services to be provided depends upon the terms of the engagement.

Please Note: Rankings and/or recognition by unaffiliated rating services and/or publications should not be construed by a client or prospective client as a guarantee that he/she will experience a certain level of results if Evensky & Katz / Foldes Wealth Management is engaged, or continues to be engaged, to provide investment advisory services, nor should it be construed as a current or past endorsement of Evensky & Katz / Foldes Wealth Management by any of its clients. Rankings published by magazines, and others, generally base their selections exclusively on information prepared and/or submitted by the recognized adviser. Rankings are generally limited to participating advisers.

1-800-448-5435 | Evensky.com



EVENSKY & KATZ / FOLDES
— WEALTH MANAGEMENT —