



When life changes, your estate plan should too.

Have you recently celebrated the birth of a new family member? Moved to a new state? Experienced a large financial windfall or a loss? Changed relationship status? They are all good reasons to review your estate plan.

The underlying question: Does your plan meet your current goals?

## Use This Helpful Checklist

This checklist can help you prepare, care for others and manage the distribution of your assets.

- Review your will, checking for updates that may need to be made because of a change in your life or a beneficiary's.
- Consider the impact of any tax law changes or the decision to add a gift to The Central Florida Council, Boy Scouts of America in your plan.
- Check that the executor or personal representative you've named is still the qualified individual you want to manage your estate, resolve claims, minimize taxes and distribute the designated portions to your beneficiaries.
- Be sure you are comfortable with the guardian named in your will for those under your care. If your dependents were minor children who are now grown, does a guardian still need to be listed?
- Look over beneficiaries designated for your insurance and retirement plans to make sure you haven't named a now-deceased loved one or a former spouse.
- Make sure the titles for your assets reflect your current circumstances and wishes, so they go to the people and organizations you intend.

- Include a health care power of attorney to guide your family and health care providers when you are unable to make decisions for yourself.

Work with your estate planning attorney to make any updates. Take the time to inform your beneficiaries of their status to avoid surprises later.

## **Make a Difference Through Your Estate**

When you use your estate plan to support the Central Florida Council, you are establishing a legacy of generosity. We would be happy to talk to you about how you can further our mission with a gift. Simply contact the Development Department at 407-703-0282 to take the next step.