

The Dream Protector Checklist

Prepared for: Date:

This checklist is designed to protect your dreams by anticipating life's unexpected events. Although it is possible to use this checklist on your own, we recommend working on it with your advisory team as part of your estate plan.

	Financial Confidence Strategy	Yes	No	?	Specific Action	✓
1	Signed Will(s) updated or reviewed in the past two years in light of life changes.					
2	Signed Powers of Attorney for both financial matters and personal care.					
3	Up to date net worth statement listing your assets and liabilities.					
4	Physical Inventory of all physical assets over \$100 value. Back up with pictures.					
5	Inventory of all your bank accounts, investments, pensions, insurance, etc.					
6	If you have employee benefits, have you reviewed them in the past year?					
7	Have a system so that family members know where to locate your financial & estate records as well as login info for digital assets					
8	Comprehensive beneficiary audit on all registered investments & insurance policies, coordinated with your will(s)					
9	Reviewed the pros and cons of jointly owning non-registered assets.					
10	Enough liquid capital or life insurance / health insurance to cover cash needs & family lifestyle in event of death, serious illness or accident.					
11	Have clearly prepared your executor(s) for the work that must be done when you die.					
12	Reviewed financial plan with an independent Certified Financial Planner in past two years.					
13	Investment portfolio reviewed in the past two years by an independent Portfolio Manager.					
14	Reviewed debts including mortgages with a Certified Financial Planner in the past year.					
15	Establish an annual reminder to review and update estate documentation & this checklist.					