



Family Protection & Estate Planning Checklist (Illinois)

Simple steps to create clarity, protect your loved ones, and stay in control.

1. Decision-Making Authority

If you become unable to handle financial or medical matters, the right documents allow someone you trust to step in.

- Do you have a Power of Attorney for Property? **(Yes / No / Not Sure)**
- Do you have a Power of Attorney for Health Care? **(Yes / No / Not Sure)**
- Have you chosen someone you trust for these roles? **(Yes / No / Not Sure)**

2. Your Estate Plan Foundation

Your plan should reflect your current wishes and life situation.

- Do you have a will or trust in place? **(Yes / No / Not Sure)**
- Has your plan been reviewed in the last 2–3 years? **(Yes / No / Not Sure)**
- Does your plan reflect your current wishes? **(Yes / No / Not Sure)**

3. Your Home and Real Estate

How your property is titled affects how it transfers.

- Do you know how your property is titled? **(Yes / No / Not Sure)**
- Have you considered placing your home in a trust? **(Yes / No / Not Sure)**
- Will your property require probate? **(Yes / No / Not Sure)**

4. Financial Accounts and Beneficiaries

Your accounts should align with your estate plan.

- Are your beneficiaries up to date? **(Yes / No / Not Sure)**
- Do your accounts align with your plan? **(Yes / No / Not Sure)**
- Do you have primary and contingent beneficiaries? **(Yes / No / Not Sure)**

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5. Planning for Incapacity

Planning ahead allows your family to act with clarity.

- Do you know who would step in if needed? **(Yes / No / Not Sure)**
- Would your family need court approval? **(Yes / No / Not Sure)**
- Have you made your wishes known? **(Yes / No / Not Sure)**

6. Family Communication

Communication helps avoid confusion and conflict.

- Does your family know where documents are? **(Yes / No / Not Sure)**
- Have you shared your wishes? **(Yes / No / Not Sure)**
- Is there a clear plan in place? **(Yes / No / Not Sure)**

7. Avoiding Unnecessary Delays

Planning now helps reduce stress later.

- Will your setup require probate? **(Yes / No / Not Sure)**
- Can you simplify things for your family? **(Yes / No / Not Sure)**
- Have you streamlined asset transfers? **(Yes / No / Not Sure)**

A Gentle Takeaway

If you answered 'No' or 'Not Sure' to several questions, it may be time to review your plan. These issues can often be addressed with the right guidance.