

LEGAL HEALTH CHECK-UP CHECK LIST

Have you recently experienced any of the following situations requiring you to consider taking any of the legal action steps noted...

1. Birth/adoption:

- Will/guardian
- Gifts to minors/trusts
- Change beneficiaries

2. Divorce:

- Check compliance with agreement/order
- Revise will
- Revise deed
- Auto titles
- Change beneficiaries, pension, insurance, IRAs
- Resume maiden name

3. Death of Spouse:

- Revise will
- Consider gifts to children
- Change beneficiaries
- Power of Attorney
- Pre-nuptials
- Trusts

4. Married/remarried:

- Change deed
- Change beneficiaries
- Power of Attorney
- Step-children: name change, adoption
- Revise will
- Change name
- Living will

5. Substantial change in size of estate:

- Increase: gifts, tax planning, estate planning, credit rating repair
- Decrease: negotiate with creditors, bankruptcy, modify support, unemployment benefits, administrative benefits

6. Moved residence (change states):

- Arrival: review will, real estate settlement, driver's license, business, professional license
- Departure: real estate, legal referral (new state), lease

7. Death of executor:

- Revise: will, power of attorney, living will, guardian

8. Serious illness of family members:

- Will
- Gifts/transfers
- Power of Attorney
- Living will

9. Change in business number, interest:

- Form: partnership, corporation, fictitious name, tax I.D., sales tax, registration
- Power of Attorney
- Living will
- Professional license
- Zoning
- Tax counsel
- Insurance/Liability considerations

10. Retirement:

- Self-employment: wind down, dissolution, transfer
- Social security
- Estate planning
- Power of attorney/will
- Business planning

11. Change in health, serious illness of family member:

- Available benefits
- Power of attorney
- Gifts
- Change in insurability
- Estate planning
- Living will
- Transfer assets
- Guardianship

12. Acquisition of property in another state:

- Local municipal regulations
- Foreign estate planning
- Taxing

13. Irresponsibility of child:

- Wills and Trusts
- Estate planning
- Liability insulation
- Emancipation
- Auto titles

14. Home alterations:

- Municipal regulations
- Zoning
- Permits
- Liens

15. Charged with crime:

- Civil liability
- Professional license
- Transfers

16. Crime victim:

- Civil cause of action
- Crime victim compensation

17. Contracts:

- Employment
- Leases
- Consumer

18. Finances:

- Taxes
- Income
- Reassessment

19. Serious Injury:

- Statute of limitations
- Health benefits
- Social security disability
- Workers' compensation

20. Business Sale/Acquisitions:

- Form: Corporation, LLC, Partnership, Fictitious Name
- Corporate Records update
- Employment contracts
- Non-compete
- Warranties

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