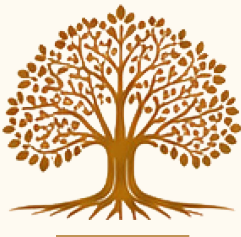


ANNUAL REVIEW

Checklist



“Plans are most effective when they are kept current.”

A Little Time Today for a More Secure Tomorrow.

Life changes, and so do your plans. Use this checklist once a year to review important information, update records, and make sure everything is current. Keeping your information up to date can help avoid confusion, reduce stress, and ensure your wishes are honored.

PERSONAL INFORMATION

☐ Review and update personal information

☐ Verify emergency contacts

☐ Update family contact information

☐ Check for changes in marital status or dependents

☐ Make sure important documents are current

HEALTHCARE INFORMATION

☐ Review current healthcare providers

☐ Update medication list

☐ Confirm allergies and medical conditions

☐ Review health insurance information

☐ Update pharmacy information

☐ Note any changes in medical care needs

FINANCIAL INFORMATION

☐ Review banking information

☐ Check retirement and investment accounts

☐ Update beneficiary designations

☐ Review life insurance and other policies

☐ Assess major assets (home, vehicle, etc.)

☐ Update information on valuable property

☐ Review debts and outstanding loans

ESTATE AND LEGAL DOCUMENTS

☐ Confirm last will and testament is current

☐ Review trust information

☐ Verify powers of attorney (financial and medical)

☐ Check advance directive / living will

☐ Make sure attorney information is up to date

☐ Review property deeds and titles

☐ Update any other legal documents as needed

FAMILY AND LOVED ONES

☐ Review and update list of people to notify

☐ Confirm guardian information (if applicable)

☐ Discuss and update final wishes if needed

☐ Review funeral and memorial preferences

☐ Keep personal messages and legacy information current

☐ Make sure loved ones know where important documents are located

ACCOUNTS AND SUBSCRIPTIONS

☐ Review monthly bills and automatic payments

☐ Update account login information

☐ Check memberships and subscriptions

☐ Cancel accounts or services no longer needed

☐ Ensure important account contacts are current

☐ Review and update online account security



“Review. Refresh. Be Ready.”



GAVREL FAMILY PLANNING KIT

**This worksheet is from the
Gavrel Family Planning Kit.**

Get the full kit free at

GavrelGuidance.com

Honor Your Past. Protect Your Present. Prepare Your Future.