

Sather Financial Group, Inc.
Private Wealth Managers

Annual Review Checklist

Below you will find a number of questions. A positive answer to any of them may indicate a need to review our estate plan. Check the appropriate boxes and return to your financial planner.

Specific Bequests

- I would like to make specific bequests to individuals not currently included in my plans-or delete the names of one or more persons (or charities) currently named.
- I would like to change the amounts of some of the bequests I have made.

Changes in Valuation

- The value of my estate has changed more than 20 percent in the last two years.

Special Provisions for Children

- My health (my spouse's or children's health) has deteriorated substantially in the last year.

Newly Born or Adopted Children

- A child (grandchild) has been born (or adopted) since our last review.

Handicapped or Incompetent Children

- A child (grandchild or other dependent) has become handicapped or seriously injured since our last review.

Status of Family Marriages

- A member of the family has become divorced or separated since our last review.

Cancellation of Loans to Children and Equalization of Inheritance

- I would like to discharge an obligation owed to me by canceling the loan in my will.
- I would like to provide a clause to equalize any gifts made in the past (or to be made in the future) to certain children (grandchildren).

Life Insurance

- I have added (or dropped) more than \$50,000 of life insurance since our last review.
- I have changed (or would like to change) a beneficiary designation on an existing policy.
- I feel I may need more life insurance, but I don't know how much to purchase or what type to consider.

Gifts to Minors

- I would like to make substantial gifts to minor children (grandchildren).

Gifts to Charities

- I would like to add (delete) one or more charitable beneficiaries.
- I would like to change the amount of my bequest to certain charities.

Business Interests

- I have entered into a stock (partnership) buy-sell agreement since our last review.
- My business situation has changed significantly since our last review.

Guardians, Executors, and Trustees

- I would like to name a particular person as advisor to my executor and trustees.
- I would like to reconsider the designation of the guardians, executors, and trustees I have named.

Other

- I would like to review my estate plans for the following reasons. _____
- I would like to know how the latest tax law affects my estate plan.