

- ☐ **DO YOU HAVE A WILL?** A will does not protect your assets against probate and can be costly in attorneys' and court fees that may essentially deplete the amount of your heirs' inheritance.
- ☐ **DO YOU HAVE A TRUST?** A trust can be beneficial in protecting your assets against creditors and is an effective tool in protecting your estate if set up properly.
- ☐ **HAVE YOU HAD YOUR TRUST REVIEWED IN THE PAST THREE YEARS?** It is important to have your trust reviewed periodically to protect it against changes in tax laws and or estate planning laws.
- ☐ **DO YOU KNOW IF YOUR TRUST HAS BEEN FUNDED PROPERLY?** In many cases, individuals have a trust set up but their assets haven't been titled in trust correctly. In Arizona, as of 2026, any assets over \$200,000 (for personal property) or \$300,000 (for real property)* will automatically go to probate.
- ☐ **HAS YOUR SUCCESSOR TRUSTEE BEEN NOTIFIED AND ACCEPTED THE RESPONSIBILITY?** Many trustees believe that their successor trustees will automatically assume the responsibility. The successor trustee has to sign an acceptance in order to act as the successor trustee or decline if they do not want the responsibility.
- ☐ **CAN YOU MAKE CHANGES TO YOUR TRUST WITHOUT HAVING TO RETURN TO YOUR ATTORNEY?** There are many trusts that can not be administered easily or are not user friendly. You may be required to make additional trips to your attorney's office and thus pay higher fees.
- ☐ **DO YOU KNOW WHAT TO DO AT THE DEATH OF THE FIRST SPOUSE?** Many people believe that once their trust is in place there isn't anything else to worry about. Estate administration can be a lengthy, expensive and very complicated process.
- ☐ **IS YOUR TRUST EASY FOR YOUR SUCCESSOR TRUSTEES TO MANAGE?** In some cases, the language in the trust makes it difficult for your successor trustees to make changes or not be able to make changes at all.
- ☐ **IS YOUR TRUST PORTABLE?** A trust is portable when it specifies that it is recognized in all 50 States as a legal document.

**IF YOU HAVE ANSWERED "NO" OR "I DON'T KNOW" TO ANY OF THESE QUESTIONS,
IT IS VERY IMPORTANT THAT YOU HAVE AN ESTATE PLANNING REVIEW TODAY.**

**Numbers taken from the Superior Court of Arizona in Maricopa County
www.superiorcourt.maricopa.gov & www.azleg.gov/ars/14/03971.htm*

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