



# Meurer Law Offices, P.C.

*Protecting your lifetime of hard work*

Atty. Michael T. Meurer

Atty. Matthew P. Zanotelli

Licensed in Colorado and Wisconsin Licensed in Colorado and Oregon

## ANNUAL REVIEW CHECKLIST

(Please attach additional pages as needed)

**NAME:** \_\_\_\_\_ **Phone:** \_\_\_\_\_

**Email:** \_\_\_\_\_ **Address:** \_\_\_\_\_

### FAMILY: (Please circle applicable areas and/or give details below)

Have there been any: births, deaths, marriages, or divorces in your family or anyone named in your estate plan?  **YES**  **NO**

Details: \_\_\_\_\_

Has any beneficiary reached age 18? 21?  **YES**  **NO**

Who? \_\_\_\_\_

Do you want to provide for anyone not now named in your estate plan ?  **YES**  **NO**

Who? \_\_\_\_\_

Are there any changes in your wishes or objectives?  **YES**  **NO**

Details: \_\_\_\_\_

Are there any gifts you wish to change?  **YES**  **NO**

Details: \_\_\_\_\_

### ASSETS: (Please circle applicable areas and/or give details below)

Have there been any major changes (increases/decreases in your/spouse's assets or debt)?  **YES**  **NO**

Details: \_\_\_\_\_

Have you/spouse sold, damaged, mortgaged, lost, or signed a contract affecting any assets?  **YES**

**NO**

Details: \_\_\_\_\_

Have you/spouse made any gifts, or loans to any person named in your estate plan?  **YES**  **NO**

Details: \_\_\_\_\_

Have you/spouse added, dropped, or borrowed on any life insurance?  **YES**  **NO**

Details: \_\_\_\_\_

Have there been any changes in your/spouse's employment or business?  **YES**  **NO**

Details: \_\_\_\_\_

Have you/children/heirs received any inheritance?  **YES**  **NO**

Details: \_\_\_\_\_

Any other family changes or comments? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_