



The Hsu Law Firm PLLC - 2020 Estate Planning Checklist ©

Question	Yes	No	问题	有	没有
1. Do you have an updated will? <ul style="list-style-type: none"> • Marriage/Divorce • Birth of child • Charity 			1. 你有更新的遗嘱吗? <ul style="list-style-type: none"> • 结婚/离婚 • 孩子出生 • 慈善机构 		
2. If you have minor children, have you chosen a guardian in your will?			2. 如果您有未成年子女, 您是否已在遗嘱中选择监护人?		
3. Have you executed documents to make decisions for you when you can't? <ul style="list-style-type: none"> • Durable Power of Attorney • Healthcare Proxy • Living Will 			3. 当你不能做决定时, 你是否准备好文件允许他人为您做决定? <ul style="list-style-type: none"> • 授权书 • 醫療決定 • 是否人工生命支持 		
4. Have you set up a revocable living trust to reduce assets subject to probate? <ul style="list-style-type: none"> • Real estate • Valuable personal property 			4. 您是否建立了可撤销的信托来减少遗嘱认证的手續? <ul style="list-style-type: none"> • 房地产 • 宝贵财产 		

Question	Yes	No	问题	有	没有
<p>5. Have you update beneficiary designations for other financial assets?</p> <ul style="list-style-type: none"> Retirement accounts (401(k), IRA) Bank/brokerage accounts Life insurance policy 			<p>5. 您已经指定您的金融资产的受益人吗?</p> <ul style="list-style-type: none"> 退休帐户 (401(k), IRA) 投资账户 人寿保险单 		
<p>6. If your assets exceed the current estate tax exemption, have you done additional planning to reduce your tax?</p> <ul style="list-style-type: none"> Fed exemption: \$11.58M NY exemption: \$5.85M Annual gifts: \$15,000 Family dynasty trust Irrevocable life insurance trust (ILIT) 			<p>6. 如果您的资产超过当前的遗产税免税额，您是否作了其他计划来减少税金？</p> <ul style="list-style-type: none"> 聯邦免稅額：\$11.58M 紐約免稅額：\$5.85M 每年的禮物：\$15,000 多代家庭信任 不可撤銷的人壽保險信託 (ILIT) 		

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*** Checklist for presentation purposes only - not legal advice ***