# Your Yearly Estate Check-up Day

*One appointment with yourself per year. Pick a date you can't forget — birthday week, New Year's weekend, or the day after taxes are filed. Two hours, good coffee, the organizer open on the table.*

**This year's Check-up Day: ___ Completed on: ___**

## The two-hour routine

| Task | Time |
|---|---|
| ☐ Reread your will and POAs: do they still match your wishes? Executor and agents still right? | 20 min |
| ☐ Rerun the Beneficiary Audit on every account and policy (Section F of the organizer) | 30 min |
| ☐ Update the Master Asset Inventory: new accounts, closed accounts, new valuables, changed balances | 20 min |
| ☐ Refresh the Digital Estate Register; confirm legacy contacts are still set and still the right people | 20 min |
| ☐ Check key contacts: everyone alive, well, and still the right choice? | 10 min |
| ☐ Update the Insurance & Benefits Register and the Document Locator | 10 min |
| ☐ Tell your family (or your executor) about anything that changed | 10 min |

## Don't wait for Check-up Day

### Update within the month if any of these happen:

marriage or divorce (yours or an heir's) · a death of a spouse, beneficiary, executor, or agent · a birth or adoption · moving to another state · buying or selling a home or business · a large inheritance · a serious diagnosis

> **Why the yearly rhythm matters:** several states change their probate thresholds and rules every year — 2025 alone rewrote the numbers in nine states. Your Check-up Day is also the day to grab the freshest state-by-state table at ellisfamilyguides.com/bonus.