



Jill Turner Associates – Financial Planning Checklists

01 - Wills and Estate Planning

1.	Have you made a will?	
2.	Has your will been invalidated by marriage?	
3.	Does your will continue to reflect your wishes and needs?	
4.	Have arrangements been made in your will (or by other means) to provide for your children and other dependents?	
5.	If your partner dies will you and any dependants remain financially secure?	
6.	Are you (and your partner) UK domiciled?	
7.	Will you be leaving a substantial Inheritance Tax Liability?	
8.	Has the nil rate band been used to reduce IHT liability in your will or by lifetime gifts?	
9.	Are you relying on the transferable nil rate band to reduce inheritance tax?	
10.	Can you use annual exemptions/ usual expenditure from income and the potentially exempt transfer provisions to make lifetime transfers?	
11.	What trust arrangements have you made?	
12.	Have you placed any life policies in trust?	
13.	Are existing trust arrangements appropriate from a taxation and personal point of view?	
14.	How have you arranged property ownership, as tenants in common or joint tenancy?	
15.	Have you made an enduring power of attorney or a lasting power of attorney?	
16.	Do you have any business interests that may form part of your estate?	



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