RFA
Reilly Financial Advisors

# Family Wealth Transitions
## Preparedness Checklist

Careful preparation, communication, and clear goals will significantly enhance the success of your Family Wealth Transition

- ☐ Our family has an estate plan in place and we have created the necessary legal documents to carry out the plan.
- ☐ Our estate planning documents are periodically reviewed and are up to date.
- ☐ Our financial plan has been completed and is up to date.
- ☐ We have communicated our estate plan to our family, the designated beneficiaries, and to the parties that are responsible for carrying out the wishes of our plan.
- ☐ Our family understands the basic goals we aim to accomplish with our financial estate plans.
- ☐ Our family continues to have ongoing communications about topics of importance to the family (financial plans, estate plans, family history, family values, etc.)