LEGACY PLANNING

Maintenance Checklist

SAGEVAULT

Your Quick Guide to Keeping Your Legacy Plan Up to Date

You've already done the hardest part—getting everything in place. Now it’s time to make sure your plan stays clear, current, and easy to act on.

This checklist helps you review your documents and decisions every 1–3 years (or after a major life event) so your loved ones are never left guessing.

> *Clarity is the greatest gift you can leave behind. It protects your loved ones when they need it most.*

How Often Should I Review?

Every 3 years (even if nothing has changed)

After any major life events like:

- Marriage or divorce
- Birth or adoption
- Death of a loved one
- Change in health or diagnosis
- Move to another state
- Change in executor, guardian, or POA
- Significant financial changes (new home, business, inheritance)

What to Review & Update

Category	Review Questions	Notes	Done?	Date
Will & Trust	Is it current? Are all names, gifts, and wishes accurate? Are guardians and trustees still the right fit?			
Powers of Attorney	Are medical and financial POAs still legally valid and appropriate?			
Medical Directives	Does your advance directive reflect your current wishes? Does your healthcare proxy understand their role?			
Beneficiary Designations	Are all retirement, insurance, and bank account beneficiaries updated?			

What to Review & Update

Category	Review Questions	Notes	Done?	Date
Asset List	Have you added or sold any accounts, property, or valuables? Does your executor know where to find your Legacy Inventory?			
Digital Access	Are passwords and digital accounts current and accessible to your executor/POA?			
Key Roles	Are your executor, POA, and guardians still the right people for the job?			
Family Communication	Have you discussed your plan with your executor and loved ones recently?			
Legal & Financial Advisors	Do they have your current documents and know your goals?			

What to Review & Update

Category	Review Questions	Notes	Done?	Date
Storage	Are documents stored securely—and can your family access them if needed?			
Legacy Messages	Have you written any letters, created video messages, or shared stories you want passed down?			

Pro Tips to Stay Organized

- Set a calendar reminder to review your plan every 2–3 years.
- Keep a printed and digital copy of this checklist with your estate documents.
- Let someone you trust know where this checklist and your key documents are stored.

Optional Add-Ons to Deepen Your Legacy

Legacy Idea	Completed?	Notes
Ethical Will or Legacy Letter		
Video message to loved ones		
Family meeting or group conversation		
Charitable giving or bequests		
Instructions for meaningful heirlooms		

Need Help Reviewing of Sharing Your Plan?

You’ve already done the most important work—now let’s make sure your loved ones understand it.

Schedule your free 30-minute Legacy Alignment Consultation

In this supportive session, we’ll help you:

- Confirm your plan is up to date
- Clarify next steps for your executor
- Create a communication strategy that preserves family harmony

No awkward conversations—just clarity, care, and confidence.

What SageVault Does Differently

I bridge the gap between meaningful conversations and effective action. I’m your partner who helps you navigate the entire process with confidence.

Estate Planning Essentials - *Starting from scratch*
Transform insights into action plan • Prepare for attorney meetings • Document organization • Family communication

Estate Plan Refresh - *Updating existing documents*
Review current documents • Identify gaps • Coordinate updates • Ensure documents reflect true wishes

Family Alignment Program - *Complex situations*
Facilitate family meetings • Navigate dynamics • Address fairness concerns • Prevent future conflict

You're not just organizing paperwork —you're preserving peace, protecting relationships, and passing on your values.

SAGEVAULT

EXECUTOR & LEGACY PLANNING SERVICES

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