
THE SIGNATURE RESOURCE

The Coordination Gap™ Checklist

Most families don't have a bad plan. They have pieces. Use this checklist to see whether your decisions are still working together.

InheritGuard Partners

Coordination. Collaboration. Continuity.

inheritguardpartners.com

DOCUMENTS & FOUNDATIONS

- Do you have a current will?
- Have you established a revocable living trust (if appropriate)?
- Are financial and healthcare powers of attorney in place?
- Do you have advance healthcare directives?

COORDINATION ACROSS ADVISORS

- Does your CPA know your estate strategy?
- Does your financial advisor know your tax strategy?
- Does your attorney know your investment and beneficiary structure?
- Is there one place where your full plan is documented?

ALIGNMENT OVER TIME

- Have beneficiaries been reviewed in the last 12 months?
- Is your trust actually funded (assets retitled into it)?
- Do account titles match your estate plan?
- Has your plan been reviewed in the last 3 years?
- Has your plan kept pace with major life changes?

If you checked fewer than you'd like, you may be living inside The Coordination Gap™. That's exactly what a Private Review is designed to close.

Next Step — Take the Estate Score™

A simple assessment that identifies where coordination gaps may exist. Visit ericrodriguez.co/assessment to begin.

This checklist is provided for general educational purposes only and does not constitute legal, tax, or financial advice. InheritGuard Partners does not provide legal or tax advice. Consult qualified professionals about your specific situation.