**FEBRUARY CHECKLIST**

* Make an appointment with an estate planning attorney
* Review existing estate planning documents
* Review financial statements
* Review beneficiary designations
* Look for deeds to real estate to see how your real property is owned. *Look for a warranty deed or quit claim deed to see the names on the document. If you purchased real estate, the owner is most often listed as the grantee.*
* Make an appointment with your tax preparer
* Touch base with your financial planner

