

Annual Update Worksheet

Use this worksheet to track your annual reviews and updates.

Every time you review this organizer (ideally once a year), record the date and note what you changed. This creates a clear history of updates and shows your executor that you kept this current.

How to use this worksheet:

1. Set your annual review date (pick a memorable date)
2. When that date comes around, review the entire organizer
3. Update any sections that have changed
4. Record what you changed in this worksheet
5. Sign and date it

That's it. Simple but important.

Let's track your updates.

Your Annual Update Worksheet

A yearly check so this book never goes stale. Set a date and run through it.

YOUR ANNUAL REVIEW

ANNUAL REVIEW DATE (E.G. MY BIRTHDAY)

REMINDER SET WHERE

UPDATE LOG

REVIEW DATE

MAJOR CHANGES MADE

No changes needed, everything is still current

SIGNATURE

DATE

SECTIONS UPDATED THIS REVIEW

- Part 1: Personal Foundations
- Part 2: Core Estate Planning
- Part 3: Financial & Legal Assets
- Part 4: Obligations & Risks
- Part 5: Modern Assets
- Part 6: Practical Everyday Information
- Part 7: Supporting Documents
- Part 8: Legacy & Family Continuity

Your Annual Update Worksheet (cont.)

QUICK REFERENCE: WHAT TO CHECK EACH YEAR

Contact, medical and healthcare details still current?

Will still current? Executor and guardian still able?

Funeral wishes changed?

Accounts, retirement balances and beneficiary designations still correct? Beneficiary designations on 401(k)s, IRAs and life insurance are easy to forget and often override your Will, so review who you've named from time to time and update it directly with each provider if anything has changed.

Property, investments or business changes?

New debts, or debts paid off? Loans made to others?

Digital accounts, passwords and devices up to date?

Memberships, subscriptions and utilities current?

Legacy letters and wishes still reflect how you feel?

NOTES FOR YOUR EXECUTOR, AND ANYTHING ELSE FROM THIS REVIEW