Vanilla

2025 Calendar of Estate Planning Conversations

This calendar features timely topics and techniques to help you provide continual value for clients and discover ways to grow your business.

KEY: Client Events · Strategy & Planning Considerations · Vanilla Software & Report Capabilities · Non-taxable estate techniques · Taxable estate techniques

January

- Resolutions: Setting goals and objectives
- Annual trust, tax & estate/planning review
- Provide estate overview, determine if additional docs are needed, review opportunities
- DSUE, trusts: Marital, bypass, credit shelter, SLAT, QTIP

February

- American Heart Month
- Confirm and verify life & health insurance coverage
- Check insurance coverage, verify fiduciaries
- Healthcare proxy
- ILIT

March

- Snowbirds return
- Determination of state residency, confirm property & casualty insurance
- Confirm financial team
- State estate tax

April

- Income taxes
- Filing status and dependents
- Understand waterfall, revisit transfer tax
- Grantor trusts
- GST

May

- Weddings
- Asset protection
- Update balance sheet
- Pre/post nuptial agreements
- Trusts: Pot, family

June

- Travel
- Necessary documents
- Designate “In Case of Emergency” (ICE)
- Will, power of attorney, health care directive
- Irrevocable/living/inter vivos trusts

July

- Summer break
- Second/vacation home
- Validate proportional ownership/entity structure
- QPRT

August

- Make-A-Will Month
- Intestate/probate
- Utilize document builder, consider educational slide on intestate
- Pour-over will, revocable trust
- Testamentary trust

September

- Back to school
- Unlimited gift tax exemption for tuition
- Verify beneficiaries
- 529s, UGMAs
- GRAT, IDGT

October

- Estate Planning Awareness Month
- Gifting
- Audit plan snapshot
- Annual gift tax exemption
- Lifetime exemption

November

- Giving Tuesday
- Philanthropy
- Analyze scenarios
- DAF
- Private foundation, CRT, CLT

December

- Holiday family gatherings, payroll election
- Retirement
- Revise family tree, reflect on milestones, assess projections
- 401k, pension, Health Savings Account (HSA), IRAs