

The Checklist:

Humble but Potent





Value of the Checklist



According to a report by the University of California–San Diego, the average American consumes about **34 gigabytes of data & information** every day.



That's estimated to be the equivalent of 100,000 words heard or read every day– or about how many words in J.R.R. Tolkien's *The Hobbit* (95,356 words).

Ignorance

Ineptitude

In realms where control is within our reach,
we have two reasons we may fail:

- ▶ In three years time there has been a 36% increase in lawsuits against attorneys for legal mistakes.

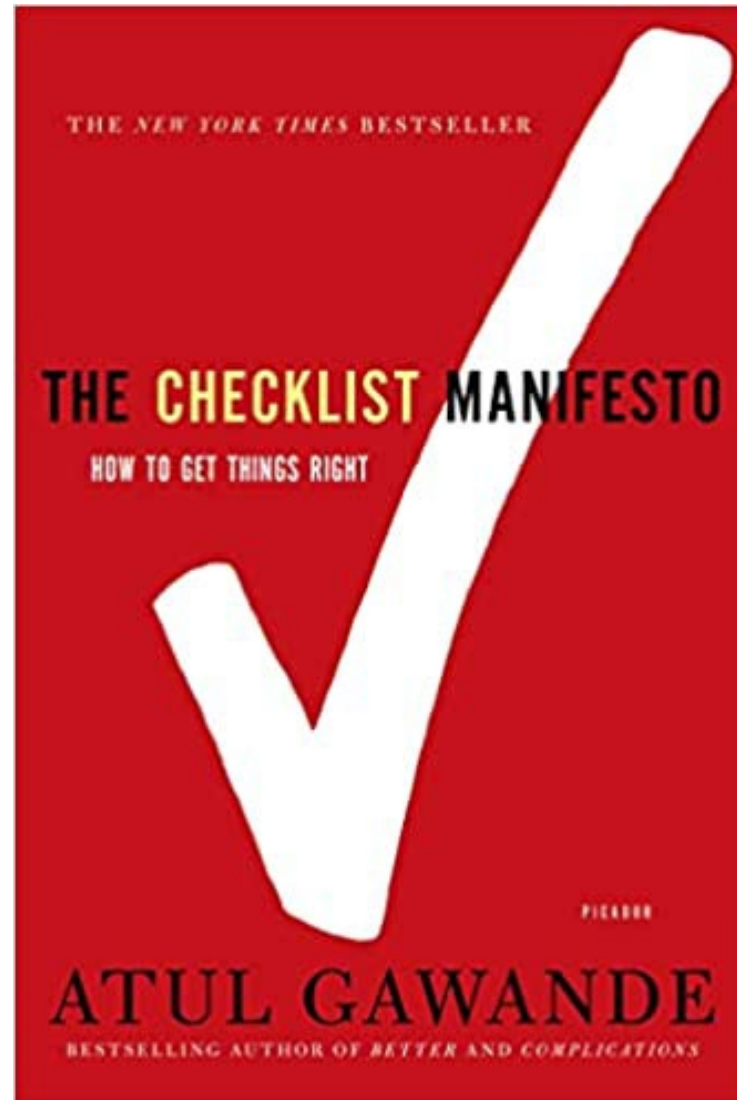
The most common of these mistakes:



- *Missed calendar dates

- *Clerical mistakes

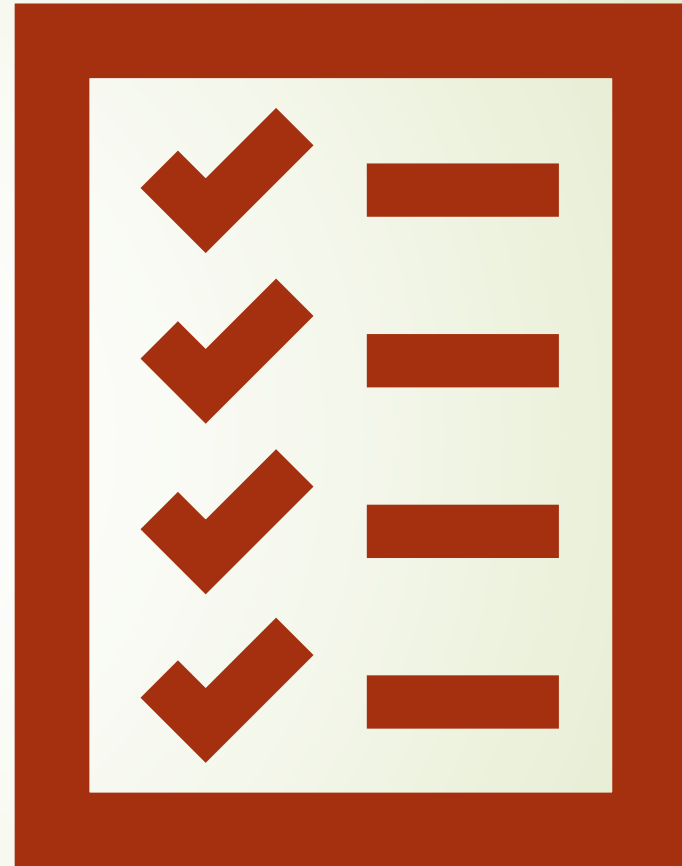
- *Application of the law.






Knowledge has both saved
us...and burdened us!

It is the
Checklist!



- ▶ A task is so complex it is easy to overlook something, or

- ▶ The undertaking is so habitual we inadvertently leave out a critical step.



A checklist helps protect against mistakes in two kinds of situations:



Standard 25 - Checklists

- ▶ The organization consistently utilizes a checklist for each of the following:
 - a. Establishing new trusts and charitable gift annuities;
 - b. Revoking a trust;
 - c. Closing out a matured trust, estate, and charitable gift annuities; [PGP, PGTS].

Benefits of the checklist for PGTS:

- Helps our organizations to avoid litigation
- Protects our credibility
- Reduces our stress level!



Creation of Checklists





The difference between a checklist and a To-Do list

- ▶ A To-Do list is an ad-hoc series of tasks that tell you *what* to do.
- ▶ A checklist is a template of tasks that tell you what to do *in order to complete a certain process*.

Using Checklists



Keeping
Checklists
Current





Types of Checklists



Work Related

Checklist Template

Prospective Donor Checklist



New Self-Trusteed Trust Checklist



Preparation & Recording of Deeds



Trust Amendment

Matured STT Checklist –
AU Fiduciary

Checklist Master





Travel Related

Business Trip Checklist



Business Packing List



Home Related



Monthly Home Tasks



The checklist is more potent than
people give it credit for.

Go back and harness its power!!