ESTATE PLANNING CHECKLIST

1. Last Will & Testament

- [ ] Appoint a guardian for children
- [ ] Appoint a guardian for pets
- [ ] Decide who gets what
- [ ] Appoint an Executor to carry out your wishes

2. Living Trusts

- [ ] Inventory all assets and decide who gets what
- [ ] Place all assets in the name of the Trust
- [ ] Appoint a successor Trustee to manage the Trust once you pass

3. Designation of Beneficiaries

Appoint a beneficiary for all non-probatable assets, which include:

- [ ] Retirement accounts
- [ ] Life insurance policies
- [ ] Pensions

4. Healthcare Documents

- [ ] Declare your healthcare preferences in a Healthcare Directive *(Living Will)*
- [ ] Appoint an agent to make medical decisions on your behalf in a Medical Power of Attorney

5. Financial Power of Attorney

- [ ] Appoint an agent to make manage your finances on your behalf
- [ ] Specify any special instructions for your agent such as donating a certain amount to a certain charity

6. Insurance & Financial Information

- [ ] Gather copies of all insurance policy documents *(life. health, car. home)*
- [ ] Create a list of financial accounts and institutions *(bank. accounts, credit cards, mortgages, loans)*

7. Proof of Identification

- [ ] Inventory all assets and decide who gets what
- [ ] Place all assets in the name of the Trust
- [ ] Appoint a successor Trustee to manage the Trust once you pass

8. Titles and Deeds

- [ ] Gather all titles and deeds for your assets *(homes, vehicles, real estate)*
- [ ] If you have a Trust, re-title all assets into the ownership of the Trust

9. Digital Accounts

- [ ] Gather a list of all digital assets *(financial accounts. social media accounts. emails, streaming services, etc.)*

10. End-of Life Instructions

Lay out your instructions for funeral preferences:

- [ ] Method of disposition *(burial. cremation, etc.)*
- [ ] Type of service
- [ ] What you want done/said