ESTATE PLANNING CHECKLIST

Ten important documents to get your affairs in order

1. Last will and testament

☐ Name a guardian for minor children
☐ Name a guardian for your pets
☐ List all personal property and decide which people/charities you want to receive each asset
☐ Name an executor to carry out the terms of your will

2. Revocable living trust

☐ List all personal property and decide which people/charities you want to receive each asset
☐ Name a successor trustee to manage your trust if you become incapacitated or after you pass away
☐ Transfer your personal property into the trust

3. Beneficiary designations

Name a beneficiary for all non-probate assets, including:

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Office of Planned Giving
Phone: 888-368-9356
Email: giftplanning@aiusa.org
4. Advance healthcare directive

- Outline your medical care preferences in your living will
- Name a healthcare agent to make important medical decisions for you in your medical power of attorney

5. Financial power of attorney

- Choose a financial agent to make important financial decisions for you
- If you want your agent to donate to charity for you, specify which charities and how much they should receive

6. Insurance policies / finance info.

- Gather copies of your life, health, car, and home insurance policy documents
- Create a list of your financial accounts (e.g., bank accounts, credit cards, mortgages, loans) and institutions

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7. Proof of identity documents

Gather your proof of identity documents:

☐ Social Security card
☐ Birth, marriage, and divorce certificates
☐ Prenuptial agreements

8. Titles and property deeds

☐ Gather the titles and deeds for your homes, vehicles, and real estate. Confirm the listed owner is correct.
☐ If you’ve established a revocable living trust, retitle your property so the trust is the owner

9. Digital logins and passwords

☐ Consider naming a digital executor in your will
☐ Create a list of all your digital assets:
   ☐ Bank & financial accounts
   ☐ Social media & email accounts
   ☐ Logins for streaming services
   ☐ Digital files, like photos & documents

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10. Funeral instructions

☐ Consider naming a funeral executor

*Create a list of your funeral preferences:*

☐ Burial, cremation, etc.

☐ What type of service you’d prefer

☐ Passages you want read

☐ Preferred charities for donations

☐ Whether or not you’d prefer flowers