

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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- 401(k) and IRA accounts
- Life insurance policies
- Pensions

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



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