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

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

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

For further inquiries, please contact:
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