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

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☐ 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

7. Proof of identity documents

Gather your proof of identity documents:

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- ☐ 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.

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- [ ] What type of service you'd prefer
- [ ] Passages you want read
- [ ] Preferred charities for donations
- [ ] Whether or not you'd prefer flowers