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
□ 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:
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