

# 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:

- 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