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

HOSPITALITY HOUSE
NORTHWEST NORTH CAROLINA

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

HOSPITALITY HOUSE
NORTHWEST NORTH CAROLINA

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

HOSPITALITY HOUSE
NORTHWEST NORTH CAROLINA