## 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
<ul> <li>List all personal property and decide which people/charities you want to receive each asset</li> </ul>
☐ 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
<ul> <li>Name a successor trustee to manage your trust if you become incapacitated or after you pass away</li> </ul>
☐ 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
<ul> <li>5. Financial power of attorney</li> <li>Choose a financial agent to make important financial decisions for you</li> <li>If you want your agent to donate to charity for you, specify which charities and how much they should receive</li> </ul>
<ul> <li>6. Insurance policies / finance info.</li> <li>Gather copies of your life, health, car, and home insurance policy documents</li> <li>Create a list of your financial accounts (e.g., bank accounts, credit cards, mortgages, loans) and institutions</li> </ul>
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
<ul> <li>Gather the titles and deeds for your homes, vehicles, and real estate.</li> <li>Confirm the listed owner is correct.</li> </ul>
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

