

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
- ☐ Consider a Christian preamble to your will

A Christian Preamble to your Will provides a fine opportunity to share this belief with your family and friends. Through the Holy Spirit, this personal statement of your faith will comfort your loved ones in their time of loss and encourage them, too, to place their trust in Jesus Christ. Prayerfully consider adding one of these sample Christian Preambles to your Will or use them as a guide in writing your preamble.

Preamble 1

I, _____, of the City of _____, County of _____, State of NE, being of sound and disposing mind and memory and being under no restraint, do make, declare and publish this my last Will and Testament, hereby revoking all Wills and Codicils heretofore made by me.

First, I commit myself to God's care, secure in His love for me and trusting in the promise of Salvation through Jesus Christ. I leave those who survive me in the comfort of knowing that I have died in this faith and have now joined my Lord in eternal glory.

Second, I commend my loved ones to grow in this faith, knowing that God will continue to provide for them despite my absence; and I encourage them to place their faith and trust in Him alone.



(Then follows the body of the Will)

Preamble 2

I, _____, of the City of _____, County of _____, State of NE, being of sound and disposing mind and memory and being under no restraint, do make, declare and publish this my last Will and Testament, hereby revoking all Wills and Codicils heretofore made by me.

First, realizing the uncertainty of this life I place full confidence and trust in my Lord and Savior Jesus Christ, who promised: "I am the resurrection and the life; he that believeth in Me, though he were dead yet shall he live; and whosoever liveth and believeth in Me shall never die" (John 11:25-26).

Second, knowing that the wages of sin is death, I believe that Jesus Christ, the only Son of God, suffered and died for the forgiveness of all my sins, which I neither deserve nor merit, but receive as a free gift of God, who is rich in grace and mercy.

Third, I urge my heirs not to set their hopes on uncertain riches, but to take hold of the life which is life indeed through faith in Jesus Christ.



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