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	h,nov	prefer
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- Passages you want read
- □ Preferred charities for donations
- □ Whether or not you'd prefer flowers

