## Estate planning checklist

Ten important documents to get your affairs in order

1. Last will and testament							
Name a guardian for minor children							
<ul> <li>Name a guardian for your pets</li> <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							
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: <ul> <li>401(k) and IRA accounts</li> </ul>							
<ul> <li>Life insurance policies</li> </ul>							



Pensions
<ul> <li>4. Advance healthcare directive</li> <li>Outline your medical care preferences in your living will</li> <li>Name a healthcare agent to make important medical decisions for you in your medical power of attorney</li> </ul>
<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:



<ul> <li>Social Security card</li> <li>Birth, marriage, and divorce certificates</li> <li>Prenuptial agreements</li> </ul>
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
<ul> <li>9. Digital logins and passwords</li> <li>Consider naming a digital executor in your will</li> <li>Create a list of all your digital assets: <ul> <li>Bank &amp; financial accounts</li> <li>Social media &amp; email accounts</li> <li>Logins for streaming services</li> <li>Digital files, like photos &amp; documents</li> </ul> </li> </ul>
10. Funeral instructions
<ul> <li>Consider naming a funeral executor</li> <li>Create a list of your funeral preferences:</li> <li>Burial, cremation, etc.</li> </ul>



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

