## 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</li> </ul>
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



<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>
<ul> <li>7. Proof of identity documents</li> <li>Gather your proof of identity documents:</li> <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
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

