Estate planning checklist

Ten important documents to get your affairs in order

| 1. Last will and testament |
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| 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 |
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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 |
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| 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 |
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| 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 |
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| 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 |
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| 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 |
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| 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 |
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| 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

