

# 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



The Putney School

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



The Putney School