

# 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 you'd prefer

Passages you want read

Preferred charities for donations

Whether or not you'd prefer flowers