

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

