

Estate Planning Checklist

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

3. Beneficiary designations

Name a beneficiary for all non-probate assets, including:

- ☐ 401(k) and IRA accounts
- ☐ Life insurance policies
- ☐ Pensions

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

7. Proof of identity documents

Gather your proof of identity documents:

- ☐ Social Security card
- ☐ Birth, marriage, and divorce certificates
- ☐ Prenuptial agreements

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

2. Revocable living trust

- ☐ List all personal property and decide which people/charities you want to receive each asset
- ☐ Transfer your personal property into the trust
- ☐ Name a successor trustee to manage your trust after you pass away

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**

6. Insurance policies / finance info.

- ☐ Gather copies of your life, health, car, and home insurance policy documents
- ☐ Create a list of your financial accounts and institutions (e.g., bank accounts, credit cards, mortgages, loans)

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 trust, retitle your property so the trust is the owner

10. Funeral instructions

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 prefer flowers

