

# ESTATE PLANNING CHECKLIST

## 1. Last Will & Testament

- ☐ Appoint a guardian for children
- ☐ Appoint a guardian for pets
- ☐ Decide who gets what
- ☐ Appoint an Executor to carry out your wishes

## 2. Living Trusts

- ☐ Inventory all assets and decide who gets what
- ☐ Place all assets in the name of the Trust
- ☐ Appoint a successor Trustee to manage the Trust once you pass

## 3. Designation of Beneficiaries

- ☐ Appoint a beneficiary for all non-probatable assets, which include:
  - ☐ Retirement accounts
  - ☐ Life insurance policies
  - ☐ Pensions

## 4. Healthcare Documents

- ☐ Declare your healthcare preferences in a Healthcare Directive (Living Will)
- ☐ Appoint an agent to make medical decisions on your behalf in a Medical Power of Attorney

## 5. Financial Power of Attorney

- ☐ Appoint an agent to make manage your finances on your behalf
- ☐ Specify any special instructions for your agent such as donating a certain amount to a certain charity

## 6. Insurance & Financial Information

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

## 7. Proof of Identification

- ☐ Inventory all assets and decide who gets what
- ☐ Place all assets in the name of the Trust
- ☐ Appoint a successor Trustee to manage the Trust once you pass

## 8. Titles and Deeds

- ☐ Gather all titles and deeds for your assets (homes, vehicles, real estate)
- ☐ If you have a Trust, re-title all assets into the ownership of the Trust

## 9. Digital Accounts

- ☐ Gather a list of all digital assets (financial accounts, social media accounts, emails, streaming services, etc.)

## 10. End-of Life Instructions

- ☐ Lay out your instructions for funeral preferences:
  - ☐ Method of disposition (burial, cremation, etc.)
  - ☐ Type of service
  - ☐ What you want done/said

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**Theodore T. Kurlowicz**



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