Estate Planning Checklist

Make sure your wishes will be carried out

Goals:

- Avoid Court Intervention and Unnecessary Legal Fees
- Make the transfer of your assets as easy on your loved ones as possible
- Control how and when your assets are transferred.

Estate Planning Documents	☐ Do you have a valid Last Will & Testament? ☐ Do you have a Revocable Living Trust? ☐ If you have a Trust, is your trust fully funded? ☐ Do you have a Durable Power of Attorney? ☐ Do you have an Advance Health Care Directive? ☐ If you are a business owner, do you have a succession plan? ☐ If you are a veteran, locate your DD-214 form. ☐ *Are all of these documents current and up to date?*
Review and Update	☐ Do you have a plan for your children's inheritance? ☐ Have you recently reviewed your life insurance policies? ☐ Have you updated your beneficiary designations? ☐ Have you reviewed updates to the estate tax? ☐ Have you made your funeral arrangements/expenses? ☐ Have you verified all real estate is titled correctly? ☐ Have you made a secure list of usernames and passwords? ☐ Have you had your documents reviewed by an estate planning attorney in the last 3 years?
Organize	☐ Are all of your estate planning and financial documents organized? ☐ Do your loved ones know where to find your important documents?

	☐ Have you documented any money that is currently owed to you? ☐ Update your personal property memorandum (if you have one). ☐ Create a list of any debts that you owe.

- Your estate planning documents should be reviewed every 3-5 years or anytime there is a major life event *(purchasing real estate, the birth or death of a family member, changes in the law, etc.)*
- Unsure about what type of estate plan you need? Check out our Estate Planning Quiz.

Please consult with a licensed estate planning attorney to ensure that your estate plan is up to date and is specifically tailored to your unique circumstances.