



Estate Planning Checklist



Personal Information

- Full legal name
- Spouse's name (if applicable)
- Children / dependents
- Emergency contact information

Assets & Accounts

- Bank accounts
- Retirement accounts
- Life insurance
- Real estate
- Business interests
- Vehicles
- Personal property
- Digital assets

Distribution Decisions

- Who receives your assets
- When assets are distributed
- Planning for minor children
- Special needs or protections

Decision Makers

- Executor / Personal Representative
- Trustee (if applicable)
- Guardian for minor children
- Backup decision-makers

Incapacity Planning

- Financial Power of Attorney
- Healthcare Power of Attorney
- Living Will / Advance Directive
- HIPAA Authorization

Beneficiaries

- Retirement accounts reviewed
- Life insurance beneficiaries reviewed
- Pay-on-death / transfer-on-death accounts
- Beneficiaries align with overall plan

Long-Term Care Planning

- Long-term care options reviewed
- Medicaid planning considerations
- Asset protection strategies

Legal Documents

- Will
- Trust (if appropriate)
- Deeds and asset titles reviewed

Final Steps

- Documents stored safely
- Trusted person informed
- Plan reviewed after major life changes