ESTATE PLANNING CHECKLIST

Will or Trust

- ☐ List guardians for children / pets
- ☐ Inventory list and recipients
- ☐ Name of power of attorney
- ☐ List of beneficiaries

Account Information

- ☐ Emails
- ☐ Subscriptions (cable, streaming...)
- ☐ Utilities
- ☐ Insurance (health, car, home)

Non-Physical Assets

- ☐ 401k plan / IRA accounts
- ☐ Life insurance
- ☐ Bank/savings account info.
- ☐ Investment accounts
- ☐ List of debts and account info.

Physical Assets

- ☐ List of Assets
- ☐ Titles/deeds (real estate, cars

Additional Documents/Information

- ☐ Personal Info. (social, birth certificate...)
- ☐ Any additional documents your estate planning professional requires

Estate Planning in 3 Steps:

1. Take inventory
2. Draft a plan
3. Hire a professional.

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