

Estate Planning Checklist

10 Steps to Get your Ducks in a Row!



1. Advance Directives

- ☐ Name a Healthcare Agent to make medical decisions in case you're incapacitated.
- ☐ Outline your medical wishes in a Living Will/ Directive to Physicians.
- ☐ Talk with your loved ones about your wishes.

3. Last Will & Testament

- ☐ Name an Executor and Contingent Executors to probate your will.
- ☐ Create an inventory of your personal property, and document who should receive specific items.
- ☐ Document how you want your assets distributed.

5. Beneficiary Designations

- ☐ Ensure your Beneficiary Designations such as 401(k), IRA accounts, life insurance policies are current.

7. Insurance & Accounts

- ☐ Organize your medical, dental, prescription, life, homeowners, renters, and car insurance policies.
- ☐ Make a list of your financial accounts & advisors including account numbers, passwords, etc.

9. Funeral & Burial Plans

- ☐ Share any pre-arrangements with the person you named as Executor of your Estate.
- ☐ Share your preferences for your funeral service with your faith leaders and loved ones.

2. Financial POA

- ☐ Name an Agent to make legal or financial decisions in case you're unavailable or incapacitated.
- ☐ Ensure your Financial Advisor and your Financial PoA communicate with one another.

4. Revocable Living Trust

- ☐ Name a Trustee and Contingent Trustees to manage your trust.
- ☐ Work with your Financial Advisor to ensure your property and assets are transferred into the Trust.

6. Identifying Documents

- ☐ Gather important documents such as your birth certificate, social security card, marriage certificate, divorce decree, military records.

8. Titles & Deeds

- ☐ Review the titles or deeds for your vehicles, home, boat, and other property.
- ☐ If you have a Living Trust, make sure all property has been retitled to the Trust.

10. Digital Assets

- ☐ Consider using a Password Manager to keep track of your accounts - but be sure to share the master password with your Executor.
- ☐ Don't forget email, social media, apps, & more.

What comes next? Now that you have your legal and financial ducks in a row, make sure you store this information in a safe and secure location, and share this information with your Executor, Trustee, Agents, or other loved ones. Your Executor will need to submit the signed original version of your Last Will to the Probate Court, so make it easily accessible. Review these documents & information regularly to ensure that everything stays up to date.

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Guide To Estate Planning

Mark A. Langan



Guide To Estate Planning:

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A Practical Guide to Estate Planning and Administration Michael Gau,2005 This text was written by an attorney and experienced paralegal instructor who applied his first hand knowledge of estate planning in developing this engaging look at the subject He designed this practical step by step guide by discussing and defining concepts and issues in the context of three fictional families Enabling students to relate theoretical concepts to real life scenarios in this way is a proven manner of enhancing learning retention and application of the material Through this method students will learn about traditional estate planning documents such as wills trusts and powers of attorney And they will consider alternatives to formal estate planning documents including gifts contracts and beneficiary designations This guide emphasizes practical concerns of drafting estate planning documents and provides numerous examples of such documents for students to examine and apply to the estate planning efforts for the text s three fictional families

Multistate Guide to Estate Planning (2008) Jeffrey A. Schoenblum,2007-11 Multistate Guide to Estate Planning gives the estate planning professional instant access to the estate planning laws of all 50 states and the District of Columbia In one comprehensive source the Guide provides state by state guidance on how to minimize state taxes to preserve the multistate estate achieve the desired disposition of property regardless of jurisdiction resolve commonly encountered state law problems in estate practice and assure asset protection The easy to use format enables the estate planning professional to readily locate information concerning one state s treatment of a particular issue or compare the treatment required by several states all on the same table Each table is broken into detailed separate analyses which consist of a series of detailed questions The tables are designed for state by state comparisons All information in the new and updated charts generally reflects state laws in effect on May 1 2007

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