

# ESTATE PLANNING CHECKLIST

## What Is Estate Planning?

So, what exactly is estate planning? Estate planning is a term for what you want to happen to your money and your stuff when you die or become disabled. It also includes specifics about your medical wishes and who you want to take care of your kids or pets. It's made up of documents like:

- **A WILL**
- **LETTER OF INSTRUCTION**
- **FINANCIAL POWER OF ATTORNEY**
- **MEDICAL POWER OF ATTORNEY**
- **BENEFICIARY DESIGNATIONS**

There are so many ways an estate plan benefits you and your family. It can be helpful to minimize potential estate taxes. Plus, it gives peace of mind knowing the wealth that you've worked hard to accumulate ends up where you want it to.

It can be very overwhelming and intimidating to think about creating your estate plan, that's why we created this estate planning checklist. Let's get started, here is everything you need to get your life organized.

## ☐ **Make a List of Your Assets - Including co-owners**

### ☐ **Physical Assets**

#### **Co-owners:**

Vehicle:	_____	_____
House:	_____	_____
Property:	_____	_____
Misc.:	_____	_____

### ☐ **Financial Assets**

Mutual Funds:	_____	_____
Retirement Accounts:	_____	_____
Life Insurance:	_____	_____
Bank Account(s):	_____	_____

### ☐ **Digital Assets**

Intellectual property:	_____	_____
Videos:	_____	_____
Images:	_____	_____
Misc.:	_____	_____





☐ **Create Will or Living Trust**

Choose the People You Want in Your Estate Plan

Beneficiaries:	_____	_____
Executor:	_____	_____
Guardians: (for children or pets)	_____	_____
Trusted Advisor:	_____	_____
Medical Power Of Attorney:	_____	_____
Financial Power Of Attorney:	_____	_____

☐ **Assign Items to Your Beneficiaries**

Life Insurance :	_____	_____
Retirement Accounts:	_____	_____
Other Accounts of Value:	_____	_____

☐ **Write a Letter of Intent or instructions.**

☐ **Communicate your intentions/wishes with family, friends and others involved in your plans.**

☐ **Make Copies, Distribute and Store Your Documents.**



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