Estate planning checklist

Ten important documents to get your affairs in order

1. Last will and testament

- ☐ Name a guardian for minor children
- ☐ Name a guardian for your pets
- ☐ List all personal property and decide which people/charities you want to receive each asset
- ☐ Name an executor to carry out the terms of your will

2. Revocable living trust

- ☐ List all personal property and decide which people/charities you want to receive each asset
- ☐ Name a successor trustee to manage your trust if you become incapacitated or after you pass away
- ☐ Transfer your personal property into the trust

3. Beneficiary designations

Name a beneficiary for all non-probate assets, including:

- ☐ 401(k) and IRA accounts
- ☐ Life insurance policies
- ☐ Pensions

4. Advance healthcare directive

- ☐ Outline your medical care preferences in your **living will**
- ☐ Name a healthcare agent to make important medical decisions for you in your **medical power of attorney**

5. Financial power of attorney

- ☐ Choose a financial agent to make important financial decisions for you
- ☐ If you want your agent to donate to charity for you, specify which charities and how much they should receive

6. Insurance policies / finance info.

- ☐ Gather copies of your life, health, car, and home insurance policy documents
- ☐ Create a list of your financial accounts (e.g., bank accounts, credit cards, mortgages, loans) and institutions

7. Proof of identity documents

Gather your proof of identity documents:

- ☐ Social Security card
- ☐ Birth, marriage, and divorce certificates
- ☐ Prenuptial agreements

8. Titles and property deeds

- ☐ Gather the titles and deeds for your homes, vehicles, and real estate. Confirm the listed owner is correct.
- ☐ If you've established a revocable living trust, retitle your property so the trust is the owner

9. Digital logins and passwords

- ☐ Consider naming a digital executor in your will
- ☐ Create a list of all your digital assets:
  - ☐ Bank & financial accounts
  - ☐ Social media & email accounts
  - ☐ Logins for streaming services
  - ☐ Digital files, like photos & documents

10. Funeral instructions

Keep this separate from your will, as wills are often not read until after the funeral.

- ☐ Consider naming a funeral executor

Create a list of your funeral preferences:

- ☐ Burial, cremation, etc.
- ☐ What type of service you'd prefer
- ☐ Passages you want read
- ☐ Preferred charities for donations
- ☐ Whether or not you'd prefer flowers