



Estate Planning Checklist

Ten important documents to get your affairs in order

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 610.437.2757

Last Will and Testament

- 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

Beneficiary Designation

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

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

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

Proof of Identity Documents

Gather your proof of identity documents:

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

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

Revocable Living Trust

- List all personal property and decide which people/charities you want to receive each asset
- Transfer your personal property into the trust
- Name a successor trustee to manage your trust

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**

Insurance Policies / Finance Info

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

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 trust, retitle your property so the trust is the owner

Funeral Instructions

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 prefer flowers

Van Horn Law Allentown, PA

 **Call us at 610 437-2757 to schedule your Consultation**

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 **We are located at: 147 North 10th Street, Allentown, PA 18102 (By Appointment Only)**



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