ESTATE PLANNING CHECKLIST: TOP 10

When you're ready to get your affairs in order, our team of Estate Planning Experts, Attorneys, CPA's and Care Coordinators can help you decide the best course of action. We're with you every step of the way.

1 GATHER USEFUL DOCUMENTS

The documents you need will vary based on the complexity of your estate, it's good to have these put together

- Insurance policies, especially for life and disability insurance
- Documents proving ownership of assets, such as mortgages, deeds, and titles

2 FINANCIAL INFORMATION

- Statements for any financial accounts, like savings, credit cards, retirement and investments
- Balance statements for any outstanding debts
- Taxes

3 TAKE INVENTORY OF EVERYTHING YOU OWN

Any planning for what happens to your property has to begin with a list so you can decide who gets what

- Real Estate/ Property
- Vehicles/Boats
- Furnishings/ Jewelry/ Art

4 CHOOSE A PATIENT ADVOCATE MEDICAL POWER OF ATTORNEY

- Name an individual, often a close friend or family member, authorized to make health care decisions if you are unable to do so for yourself

5 CHOOSE A FINANCIAL AGENT DURABLE POWER OF ATTORNEY

- Name a trusted individual to make sure your estate and assets are looked after

6 MAKE A LAST WILL & TESTAMENT

- Designate your beneficiaries
- Appoint someone you trust to be the guardian of your minor children.

7 CONSIDER A LIVING TRUST

- A revocable living trust can allow your heirs to avoid Probate Court

8 CREATE YOUR ADVANCE HEALTHCARE DIRECTIVE

- Also called a 'Living Will', to clarify decisions around end-of-life care
- DNR forms
- Funeral Instructions

9 DIGITAL LOGIN/PASSWORDS

- Consider apps and sites in different categories. Computer, email, Social Media, Banking, Streaming Services, Cell Phones

10 STORING YOUR DOCUMENTS

- Provide a copy to your POA and Patient Advocate or let them know where to find your papers

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