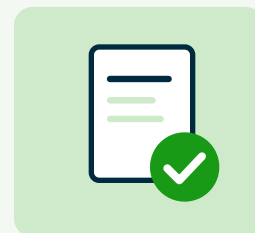


Estate Planning Document Checklist



Use this checklist to understand the essential documents that should be included in any estate plan and the purpose of each.

1. Balance Sheet

- ☐ A helpful prerequisite to estate planning documents
- ☐ Complete list of owned assets as well as accounts intended to pay out later (like life insurance)
- ☐ Includes any outstanding debts

2. Wills

- ☐ Lists wishes regarding assets
- ☐ Names guardians for minor children
- ☐ Names an executor

3. Revocable Living Trust

- ☐ Alternative to a will for large or complicated estates
- ☐ Ensures privacy from public records
- ☐ Includes any outstanding debts

4. Beneficiary Designations

- ☐ Can include individuals or groups of people, charities/nonprofits, minor children, and/or trustees
- ☐ Names recipients of life insurance policies, retirement account balances, and annuities

5. Tangible Personal Property Memo

- ☐ Ensures desired distribution for property that has sentimental value
- ☐ Can explain personal reasons for leaving property to certain beneficiaries

6. Advance Healthcare Directive (AHCD)

- ☐ Often contains a living will and medical power of attorney
- ☐ Outlines medical preferences
- ☐ Contains a HIPAA waiver

7. Financial Power of Attorney

- ☐ Designates someone to manage finances and property
- ☐ Doesn't apply to assets held in a trust

8. Insurance and Financial Documents

- ☐ Insurance policies
- ☐ Bank accounts and credit cards
- ☐ Mortgages and loans
- ☐ Tax documents
- ☐ Pensions and retirement benefits
- ☐ Investments

Estate Planning Document Checklist



9. Identification Documents

- ☐ Birth, marriage, and divorce certificates
- ☐ Social security card
- ☐ Army discharge papers, prenuptial agreements, etc.

10. Titles and Property Deeds

- ☐ Property including homes, vehicles, and other real estate
- ☐ Property may need to be retitled if a trust is established

11. Digital Account Logins and Passwords

- ☐ Will may name a separate digital executor
- ☐ Includes a list of digital assets and login information for all accounts

12. Funeral Instructions

- ☐ Details preferences for burial, cremation, etc.
- ☐ Includes any other funeral wishes like music, flowers, etc.

Want to talk more?

Schedule a Call

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