

Estate Planning Checklist

1. Last Will and Testament

- Appoint a guardian for children
- Appoint a guardian for pets
- Decide who gets what
- Appoint an Executor to carry out your wishes

3. Designation of Beneficiaries

Appoint a beneficiary for all non-probatable assets, which include:

- Retirement accounts
- Life insurance policies
- Pensions

5. Financial Power of Attorney

- Appoint an agent to make manage your finances on your behalf
- Specify any special instructions for your agent such as donating a certain amount to a certain charity

7. Proof of Identification

Gather your proof of identification cards:

- Social Security Card
- Birth, marriage, and/or divorce certificates
- Prenuptial agreements

9. Digital Accounts

- Gather a list of all digital assets (financial accounts, social media accounts, emails, streaming services, etc.)

2. Living Trusts

- Inventory all assets and decide who gets what
- Place all assets in the name of the Trust
- Appoint a successor Trustee to manage the Trust once you pass

4. Healthcare Documents

- Declare your healthcare preferences in a Healthcare Directive (Living Will)
- Appoint an agent to make medical decisions on your behalf in a Medical Power of Attorney

6. Insurance/Financial Info

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

8. Titles and Deeds

- Gather all titles and deeds for your assets (homes, vehicles, real estate)
- If you have a Trust, re-title all assets into the ownership of the Trust

10. End-of-Life Instructions

Lay out your instructions for funeral preferences:

- Method of disposition (burial, cremation, etc.)
- Type of service
- What you want done/said



Estate Documents Checklist

Sebastian Brünink



Estate Documents Checklist:

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