

# Estate Planning Checklist

## Last Will and Testament

- Name a guardian for any 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

## 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
- Retitle your property so that the trust is the owner
- Name a successor trustee to manage your trust after you pass away

## 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

## Beneficiary Designations

- 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

## Other Considerations

- Prenuptials
- Burial/cremation preferences
- Copies of birth certificates, marriage certificates, divorce
- Create a list of digital assets and passwords including:
  - Bank accounts
  - Social media and email accounts
  - Logins for streaming
  - Digital files, like photos and documents



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