Estate Planning Checklist

10 Steps to Get your Ducks in a Row!

2. Financial POA 1. Advance Directives Name a Healthcare Agent to make medical Name an Agent to make legal or financial decisions in case you're unavailable or decisions in case you're incapacitated. Outline your medical wishes in a Living Will/ incapacitated. Directive to Physicians. Ensure your Financial Advisor and your Talk with your loved ones about your wishes. Financial PoA communicate with one another. 3. Last Will & Testament 4. Revocable Living Trust Name an Executor and Contingent Executors to Name a Trustee and Contingent Trustees to probate your will. manage your trust. Create an inventory of your personal property, Work with your Financial Advisor to ensure and document who should receive specific items. your property and assets are transferred into the Document how you want your assets distributed. Trust. 5. Beneficiary Designations 6. Identifying Documents Ensure your Beneficiary Designations such as Gather important documents such as your birth certificate, social security card, marriage 401(k), IRA accounts, life insurance policies are current. certificate, divorce decree, military records. 7. Insurance & Accounts 8. Titles & Deeds Organize your medical, dental, prescription, life, Review the titles or deeds for your vehicles, homeowners, renters, and car insurance policies. home, boat, and other property. Make a list of your financial accounts & advisors If you have a Living Trust, make sure all property has been retitled to the Trust. including account numbers, passwords, etc.

9. Funeral & Burial Plans

- Share any pre-arrangements with the person you named as Executor of your Estate.
- Share your preferences for your funeral service with your faith leaders and loved ones.

10. Digital Assets

- Consider using a Password Manager to keep track of your accounts - but be sure to share the master password with your Executor.
- Don't forget email, social media, apps, & more.

What comes next? Now that you have your legal and financial ducks in a row, make sure you store this information is a safe and secure location, and share this information with your Executor, Trustee, Agents, or other loved ones. Your Executor will need to submit the signed original version of your Last Will to the Probate Court, so make it easily accessible. Review these documents & information regularly to ensure that everything stays up to date.

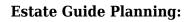
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Estate Guide Planning

Lauren Gardner



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