

# Estate Planning Checklist

*10 Steps to Get your Ducks in a Row!*



## 1. Advance Directives

- ☐ Name a Healthcare Agent to make medical decisions in case you're incapacitated.
- ☐ Outline your medical wishes in a Living Will/ Directive to Physicians.
- ☐ Talk with your loved ones about your wishes.

## 3. Last Will & Testament

- ☐ Name an Executor and Contingent Executors to probate your will.
- ☐ Create an inventory of your personal property, and document who should receive specific items.
- ☐ Document how you want your assets distributed.

## 5. Beneficiary Designations

- ☐ Ensure your Beneficiary Designations such as 401(k), IRA accounts, life insurance policies are current.

## 7. Insurance & Accounts

- ☐ Organize your medical, dental, prescription, life, homeowners, renters, and car insurance policies.
- ☐ Make a list of your financial accounts & advisors 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.

## 2. Financial POA

- ☐ Name an Agent to make legal or financial decisions in case you're unavailable or incapacitated.
- ☐ Ensure your Financial Advisor and your Financial PoA communicate with one another.

## 4. Revocable Living Trust

- ☐ Name a Trustee and Contingent Trustees to manage your trust.
- ☐ Work with your Financial Advisor to ensure your property and assets are transferred into the Trust.

## 6. Identifying Documents

- ☐ Gather important documents such as your birth certificate, social security card, marriage certificate, divorce decree, military records.

## 8. Titles & Deeds

- ☐ Review the titles or deeds for your vehicles, home, boat, and other property.
- ☐ If you have a Living Trust, make sure all property has been retitled to the Trust.

## 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 in 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

**Sebastian V. Grassi, Jr.**



## **Estate Guide Planning:**

The Complete Guide to Planning Your Estate in Virginia Linda C. Ashar, Sandy Ann Baker, 2010 What happens to your estate after you are gone is very much within your control Estate planning is not only for the wealthy it is for everyone It is simply the process of deciding where your assets are to be distributed after your death For those people who wish to preserve their assets for designated purposes such as family or special charities it becomes necessary to make special advance preparations The right plan can protect the value of your estate and spare your loved ones unnecessary hassles and legal conflicts The Complete Guide to Planning Your Estate in Virginia will help you glide through this complicated process This new book has been adapted to offer Virginia residents state specific advice for estate planning Coauthors Linda C Ashar attorney at law and Sandy Baker have crafted an estate planning primer allowing Virginia residents to become more informed and more involved during the process Virginia specific information is offered throughout this book including Virginia's probate code Virginia rules regulations and laws specific to estate planning elements of a valid Virginia will planning your living will in Virginia explanations of Virginia laws regarding durable health care power of attorneys do not resuscitate DNR orders and directives to withhold CPR The book is easy to understand context clarifies this complicated and sensitive subject and gives readers the power to take control of their future Atlantic Publishing is a small independent publishing company based in Ocala Florida Founded over twenty years ago in the company president's garage Atlantic Publishing has grown to become a renowned resource for non fiction books Today over 450 titles are in print covering subjects such as small business healthy living management finance careers and real estate Atlantic Publishing prides itself on producing award winning high quality manuals that give readers up to date pertinent information real world examples and case studies with expert advice Every book has resources contact information and web sites of the products or companies discussed

**The Complete Guide to Planning Your Estate in California** Linda C. Ashar, Sandy Ann Baker, 2009-12-15 What happens to your estate after you are gone is very much within your control Estate planning is not only for the wealthy it is for everyone It is simply the process of deciding where your assets are to be distributed after your death For those people who wish to preserve their assets for designated purposes such as family or special charities it becomes necessary to make special advance preparations To ensure your assets are protected and final wishes are carried out there are some common actions that should be taken now Proper estate planning allows you to plan for yourself and your loved ones without giving up control of your affairs Your estate plan should also allow for the possibility of your own disability It should detail what you own and whom you want to leave it to at a time of your choosing and the way you want Your estate plan should include fully disclosed controlled costs for you and your loved ones The last thing you want to worry about is having your estate drained of value through taxes and legal costs The right plan can protect the value of your estate and spare your loved ones unnecessary hassles and legal conflicts The Complete Guide to Planning Your Estate in California will help you glide through

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*The Complete Guide to Organizing Your Records for Estate Planning* John N. Peragine, Jr., 2009 Planning your estate is a long complicated process that requires much time and effort The process of organizing your records for estate planning is equally time consuming and complex Hiring an attorney to assist you may cost more than you are willing to spend With the help of *The Complete Guide to Organizing Your Records for Estate Planning* you can not only take charge of your estate planning documentation but also save time money and effort In this new book you will learn how to find an organizational system that works for you where to look for records what to record who to tell where to keep records and how often to update your records You will also find information on creating a will or a living will setting up a trust assigning power of attorney and filling out health care directives Additionally you will learn about the documents that should be included in your estate plan such as insurance policies Social Security cards birth certificates of minor children stock brokerage statements credit card numbers and statements certificates of deposit real estate deeds mortgage statements retirement account savings non retirement account savings and current bank statements The CD ROM is filled with sample documents and worksheets as well as a checklist of often overlooked information including any medications you take where you worked where your savings and checking accounts are located where your car title is located what your funeral plans or wishes are and who should receive what *The Complete Guide to Organizing Your Records for Estate Planning* will help you prepare your documents and record your final instructions and wishes By using the information provided in this book you will save money you might otherwise have spent on legal and accounting fees In addition you will save your family the frustration of searching for these documents if something should ever happen to you This book written in an easy to understand language will walk you through the process of organizing your records and make the process much easier for you and your family The companion CD ROM is included with the print version of this book however is not available for download with the electronic version It may be obtained separately by contacting Atlantic

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*A Lawyer's Guide to Estate Planning* L. Rush Hunt,Lara Rae Hunt,2004 This book provides an introduction to the basics of estate planning and will make this area of the law more accessible to the nonspecialist

**Estate Planning For Dummies** N. Brian Caverly,Jordan S. Simon,2003-03-07 Planning for your family s future made easy If you re like most people you want to be sure that once you ve passed on no more of your property and money will be lost to the government than is absolutely necessary You want to know that you ll be leaving your heirs your assets and not your debts You want to be absolutely certain that your will is ship shape your insurance policies are structured properly and that every conceivable hole in your estate plan has been filled And most of all you d like to do all of this without driving yourself crazy trying to make sense of the complicated jargon jumble of paperwork and welter of state and federal laws involved in the estate planning process Written by two estate planning pros this simple easy to use guide takes the pain out of planning for your ultimate financial future In plain English the authors walk you step by step through everything you need to know to Put your estate into order Minimize estate taxes Write a proper will Deal with probate Set up trusts Make sure your insurance policies are structured properly Plan for special situations like becoming incompetent and pet care Craft a solid estate plan and keep it up to date Don t leave the final disposition of your estate up to chance and the whims of bureaucrats Estate Planning For Dummies gives you the complete lowdown on Figuring out what you re really worth Mastering the basics of wills and probate Using will substitutes and dodging probate taxes Setting up protective trusts charitable trusts living trusts and more Making sense of state and federal inheritance taxes Avoiding the generation skipping transfer tax Minimizing all your estate related taxes Estate planning for family businesses Creating a comprehensive estate plan Straightforward reader friendly easy to use Estate Planning For Dummies is the ultimate guide to planning your family s future

**Field Guide to Estate Planning, Business Planning, and Employee Benefits** Donald F. Cady,2006

**A Practical Guide to Estate Planning for a Family with a Special Needs Child** Sebastian V. Grassi, Jr.,2010

*Every Californian's Guide To Estate Planning* Liza W. Hanks,2022-01-25 You can find estate planning books that focus on reducing taxes and basic books that explain the necessary documents in simple terms but no book deals with the complex issues that

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Multistate Guide to Estate Planning (2008) Jeffrey A. Schoenblum,2007-11 Multistate Guide to Estate Planning gives the estate planning professional instant access to the estate planning laws of all 50 states and the District of Columbia In one comprehensive source the Guide provides state by state guidance on how to minimize state taxes to preserve the multistate estate achieve the desired disposition of property regardless of jurisdiction resolve commonly encountered state law problems in estate practice and assure asset protection The easy to use format enables the estate planning professional to readily locate information concerning one state s treatment of a particular issue or compare the treatment required by

several states all on the same table Each table is broken into detailed separate analyses which consist of a series of detailed questions The tables are designed for state by state comparisons All information in the new and updated charts generally reflects state laws in effect on May 1 2007     *Estate Planning in Texas* Leslie Thomas,2016-12-20 Estate planning in Texas

*Peace of Mind Through Estate Planning* Sarah Elizabeth Siedentopf,2020-02-25 An overview of estate planning options for Georgia residents Learn what steps to take to protect your family and feel empowered to take those steps Knowing your family is protected will bring you peace of mind     **A Layman's Guide to Estate Planning in Texas** Leslie

Thomas,2016-08-01 A layman s guide to estate planning in Texas     Estate Planning Clint W. Smith,Clint W Smith J D,2013-04-10 Are you among the 50 percent of American adults who do not yet have a will For many of us busy day to day lives often result in putting the crucial process of estate planning precariously on the back burner In fact if you don t have a clear considered plan government treasurers and probate attorneys may just have the ultimate say on your estate Estate Planning A Plain English Guide to Wills and Trusts is attorney Clint W Smith s easy to read invaluable book that will demystify the confusing legal issues and dispel the common misunderstandings that can have serious repercussions for anyone with a net worth of over 50 000 Establishing a well considered estate plan now can save you or your loved ones considerable costs months of time and even relationships While many individuals believe that wills are the most beneficial way in which to handle estates the author introduces the option of revocable living trusts as a potential alternative to wills While wills by their nature result in time consuming probate public disclosure estate tax and attorney fees Smith explains that revocable living trusts can provide you with a way to minimize taxes provide flexibility help navigate the realities of a living will and solve the problems inherent to joint tenancy right of survivorship and community property Estate Planning A Plain English Guide to Wills and Trusts also clears up common misconceptions about wills offers answers to specific questions about trusts and offers a step by step guide to plan your own revocable living trust This informative essential book will teach you the questions you need to ask and motivate you to act immediately Accessible and illuminating Estate Planning will ensure that you are empowered to do a better job of it than the state and that you leave behind a fitting legacy for your loved ones     Estate Planning and Administration George H. Gray,2009-08-18 This is a simple understandable Guide for New Yorkers that answers their questions concerning Estate Planning Estate Administration Wills Living Trusts and the process to accomplish their goals     **The Mom's Guide to Wills & Estate Planning** Liza Hanks,Liza Weiman Hanks,2009 Presents a comprehensive guide on understanding and preparing wills and trusts for parents of young children describing the process of selecting a guardian buying life insurance designating powers of attorney and choosing beneficiaries     **A Visual Artist's Guide to Estate Planning** Barbara Hoffman (J.D.),1998 A visual Artist s Guide to Estate Planning is a comprehensive handbook designed to assist artists in planning their estates The book has two main parts and an appendix Part I introduces general estate planning concepts and offers practical advice and general legal discussion on issues raised



by artists at an estate planning conference Part II consists of an in depth discussion of policy and law on selected issues of estate planning and administration for visual artists This section was written by the Committee on Art Law of the Association of the Bar of the City of New York The appendix contains additional information resources and sample forms Back cover

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