

# 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

**CL Gary**



## **Estate Guide Planning:**

The Top Books of the Year Estate Guide Planning The year 2023 has witnessed a noteworthy surge in literary brilliance, with numerous captivating novels captivating the hearts of readers worldwide. Lets delve into the realm of bestselling books, exploring the fascinating narratives that have captivated audiences this year. Estate Guide Planning : Colleen Hoovers "It Ends with Us" This touching tale of love, loss, and resilience has captivated readers with its raw and emotional exploration of domestic abuse. Hoover expertly weaves a story of hope and healing, reminding us that even in the darkest of times, the human spirit can succeed. Estate Guide Planning : Taylor Jenkins Reids "The Seven Husbands of Evelyn Hugo" This captivating historical fiction novel unravels the life of Evelyn Hugo, a Hollywood icon who defies expectations and societal norms to pursue her dreams. Reids compelling storytelling and compelling characters transport readers to a bygone era, immersing them in a world of glamour, ambition, and self-discovery. Discover the Magic : Delia Owens "Where the Crawdads Sing" This evocative coming-of-age story follows Kya Clark, a young woman who grows up alone in the marshes of North Carolina. Owens weaves a tale of resilience, survival, and the transformative power of nature, captivating readers with its evocative prose and mesmerizing setting. These popular novels represent just a fraction of the literary treasures that have emerged in 2023. Whether you seek tales of romance, adventure, or personal growth, the world of literature offers an abundance of captivating stories waiting to be discovered. The novel begins with Richard Papen, a bright but troubled young man, arriving at Hampden College. Richard is immediately drawn to the group of students who call themselves the Classics Club. The club is led by Henry Winter, a brilliant and charismatic young man. Henry is obsessed with Greek mythology and philosophy, and he quickly draws Richard into his world. The other members of the Classics Club are equally as fascinating. Bunny Corcoran is a wealthy and spoiled young man who is always looking for a good time. Charles Tavis is a quiet and reserved young man who is deeply in love with Henry. Camilla Macaulay is a beautiful and intelligent young woman who is drawn to the power and danger of the Classics Club. The students are all deeply in love with Morrow, and they are willing to do anything to please him. Morrow is a complex and mysterious figure, and he seems to be manipulating the students for his own purposes. As the students become more involved with Morrow, they begin to commit increasingly dangerous acts. The Secret History is a brilliant and thrilling novel that will keep you wondering until the very end. The novel is a cautionary tale about the dangers of obsession and the power of evil.

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## Table of Contents Estate Guide Planning

1. Understanding the eBook Estate Guide Planning
  - The Rise of Digital Reading Estate Guide Planning
  - Advantages of eBooks Over Traditional Books
2. Identifying Estate Guide Planning
  - Exploring Different Genres
  - Considering Fiction vs. Non-Fiction
  - Determining Your Reading Goals
3. Choosing the Right eBook Platform
  - Popular eBook Platforms
  - Features to Look for in an Estate Guide Planning
  - User-Friendly Interface
4. Exploring eBook Recommendations from Estate Guide Planning
  - Personalized Recommendations
  - Estate Guide Planning User Reviews and Ratings
  - Estate Guide Planning and Bestseller Lists
5. Accessing Estate Guide Planning Free and Paid eBooks
  - Estate Guide Planning Public Domain eBooks
  - Estate Guide Planning eBook Subscription Services
  - Estate Guide Planning Budget-Friendly Options
6. Navigating Estate Guide Planning eBook Formats
  - ePub, PDF, MOBI, and More
  - Estate Guide Planning Compatibility with Devices
  - Estate Guide Planning Enhanced eBook Features
7. Enhancing Your Reading Experience
  - Adjustable Fonts and Text Sizes of Estate Guide Planning
  - Highlighting and Note-Taking Estate Guide Planning
  - Interactive Elements Estate Guide Planning
8. Staying Engaged with Estate Guide Planning

- Joining Online Reading Communities
- Participating in Virtual Book Clubs
- Following Authors and Publishers Estate Guide Planning
- 9. Balancing eBooks and Physical Books Estate Guide Planning
  - Benefits of a Digital Library
  - Creating a Diverse Reading Collection Estate Guide Planning
- 10. Overcoming Reading Challenges
  - Dealing with Digital Eye Strain
  - Minimizing Distractions
  - Managing Screen Time
- 11. Cultivating a Reading Routine Estate Guide Planning
  - Setting Reading Goals Estate Guide Planning
  - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Estate Guide Planning
  - Fact-Checking eBook Content of Estate Guide Planning
  - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
  - Utilizing eBooks for Skill Development
  - Exploring Educational eBooks
- 14. Embracing eBook Trends
  - Integration of Multimedia Elements
  - Interactive and Gamified eBooks

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