

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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Yicheng Fang



Estate Guide Planning:

The Complete Guide to Planning Your Estate in Massachusetts Linda C. Ashar, 2011 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 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 Massachusetts will help you glide through this complicated process This new book has been adapted to offer Massachusetts residents state specific advice for estate planning Co authors Margo Pierce and Linda C Ashar attorneys at law have crafted an estate planning primer allowing Massachusetts residents to become more informed and more involved during the process Many books on estate planning indicate you do not need the services of an attorney but this book highly recommends using an attorney versed in this area You should not go through the process alone This book is intended explain the complicated issues terminology and planning strategies of estate planning so when you do meet with a qualified attorney you will be well prepared Massachusetts specific information is offered throughout this book including Massachusetts probate code Massachusetts rules regulations and laws specific to estate planning elements of a Massachusetts will planning your living will in Massachusetts explanations of Massachusetts laws regarding durable health care power of attorneys do not resuscitate DNR orders and directives to withhold CPR Estate planning should be a positive experience It involves reviewing your situation and planning for your future Although few people want to think about the possibility of disability or disease advance planning is also a way to show your love and to reduce potential distress later Other books offer a non state specific overview of estate planning causing many readers to be misinformed about rules and regulations particular to their state but this new book provides information Massachusetts residents need to know Use this new book to craft an estate plan that is not only legally sound but also fully carries out your last wishes and protects your loved ones Atlantic Publishing is a small independent publishing company based in Ocala Florida Founded over twenty years ago in the company president e tm 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**

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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

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

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capture what the email is about a congratulations name is a good place to start you could also opt to include their new title
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