

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.

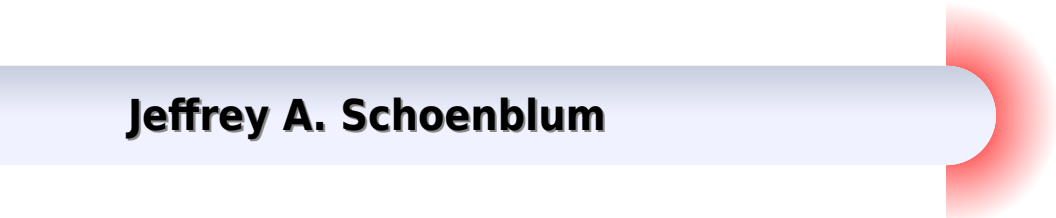
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Estate Guide Planning

Jeffrey A. Schoenblum



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The Complete Guide to Planning Your Estate in Indiana 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 e such as family or special charities e 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 Indiana will help you glide through this complicated process This new book has been adapted to offer Indiana residents state specific advice for estate planning Coauthors Linda C Ashar attorney at law and Sandy Baker have crafted an estate planning primer allowing Indiana residents to become more informed and more involved during the process Indiana specific information is offered throughout this book including Indiana e s probate code Indiana rules regulations and laws specific to estate planning elements of a valid Indiana will planning your living will in Indiana explanations of Indiana laws regarding durable health care power of attorneys do not resuscitate DNR orders and directives to withhold CPR The book e tm s 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 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

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

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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 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

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