

Estate Planning Checklist

1. Last Will and Testament

- ☐ Appoint a guardian for children
- ☐ Appoint a guardian for pets
- ☐ Decide who gets what
- ☐ Appoint an Executor to carry out your wishes

3. Designation of Beneficiaries

Appoint a beneficiary for all non-probatable assets, which include:

- ☐ Retirement accounts
- ☐ Life insurance policies
- ☐ Pensions

5. Financial Power of Attorney

- ☐ Appoint an agent to make manage your finances on your behalf
- ☐ Specify any special instructions for your agent such as donating a certain amount to a certain charity

7. Proof of Identification

Gather your proof of identification cards:

- ☐ Social Security Card
- ☐ Birth, marriage, and/or divorce certificates
- ☐ Prenuptial agreements

9. Digital Accounts

- ☐ Gather a list of all digital assets (financial accounts, social media accounts, emails, streaming services, etc.)

2. Living Trusts

- ☐ Inventory all assets and decide who gets what
- ☐ Place all assets in the name of the Trust
- ☐ Appoint a successor Trustee to manage the Trust once you pass

4. Healthcare Documents

- ☐ Declare your healthcare preferences in a Healthcare Directive (Living Will)
- ☐ Appoint an agent to make medical decisions on your behalf in a Medical Power of Attorney

6. Insurance/Financial Info

- ☐ Gather copies of all insurance policy documents (life, health, car, home)
- ☐ Create a list of financial accounts and institutions (bank accounts, credit cards, mortgages, loans)

8. Titles and Deeds

- ☐ Gather all titles and deeds for your assets (homes, vehicles, real estate)
- ☐ If you have a Trust, re-title all assets into the ownership of the Trust

10. End-of-Life Instructions

Lay out your instructions for funeral preferences:

- ☐ Method of disposition (burial, cremation, etc.)
- ☐ Type of service
- ☐ What you want done/said



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Smart Guide To Estate Planning

Kathleen Armour



Smart Guide To Estate Planning:

Smart Guide to Estate Planning Laura Spinale, 1999-08-18 An all you need to know introduction to ensuring that your wealth and wishes are protected and preserved for family and loved ones Smart Ways to determine what you are worth with a smart and easy step by step process Smart Advice on life insurance power of attorney for health care and finances long term care insurance and appointing a personal guardian for your children Smart Strategies on avoiding probate and how trusts can help you and your loved ones avoid costly legal fees and devastating estate taxes Smart Tips on what you should know when creating a will deciding on a living will and taking a hand in planning your funeral Quick reading and easy referencing with a comprehensive index and loads of sidebars and tables Smart Guides take readers seriously They satisfy even the most curious person s desire to know the essentials about any of a wide range of topics from vitamins to mutual funds to stress relief It s all about good reading and expert information The choice is yours **Smart Guide to Maximizing**

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retirement and inheritance gets even more complicated in remarriage These issues can explode couple unity and blow up developing family harmony However proper blended family money management can make money an asset to your relationship not a liability The authors use over 50 years of combined financial planning and blended family educational experience to help you envision your combined financial future and plan for how you ll get there You ll discover practical ways to merge your current financial realities and protect your marriage while doing so Get real world financial advice specific to unique blended family legal and relational matters so you can provide for your family both now and in the future

The Smart Woman's Guide to Property Law Carla Spivack, 2020-04-08 The income gap between women and men has gotten lots of attention in the last few decades today women earn seventy nine cents for every dollar men earn But fewer people are aware of the much more serious wealth gap for every dollar in wealth men own women own thirty two cents Thirty two cents Wealth matters Wealth is what gives us a financial safety net when we lose our jobs break up a relationship or divorce we or our dependents become sick or when we are hit by some other financial crisis It enables us to build security to give our children a future and to retire It is passed from generation to generation allowing wealthy families to stay wealthy over time Wealth can generate income whether through investments in the financial markets or real estate or through funding a startup business and more Significant wealth even allows us to influence our world by allowing us to contribute to political campaigns and policy initiatives For these reasons wealth is a better indicator of financial status than income it reveals who is secure and influential and who is not By treating women and men equally without recognizing the gross social and economic advantages that differentiate us the law perpetuates the wealth gap Here Carla Spivack takes readers through a tour of a woman s life stages and the property laws that may apply and hinder their financial independence From living together to marriage from divorce to inheritance the circumstances invite unfair treatment that leaves women out in the cold Understanding how to protect your assets fight for what is fair and increase financial security is increasingly important as the wage gap continues to flourish Readers will learn about the laws that work against them and how to protect themselves regardless of their relationship status For all women of all ages here is your guide to keeping your wealth not matter how your relationship fares

Reviewing **Smart Guide To Estate Planning**: Unlocking the Spellbinding Force of Linguistics

In a fast-paced world fueled by information and interconnectivity, the spellbinding force of linguistics has acquired newfound prominence. Its capacity to evoke emotions, stimulate contemplation, and stimulate metamorphosis is really astonishing. Within the pages of "**Smart Guide To Estate Planning**," an enthralling opus penned by a very acclaimed wordsmith, readers embark on an immersive expedition to unravel the intricate significance of language and its indelible imprint on our lives. Throughout this assessment, we shall delve to the book is central motifs, appraise its distinctive narrative style, and gauge its overarching influence on the minds of its readers.

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