

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



Smart Guide To Estate Planning

Mark Gomez



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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