ESTATE PLANNING CHECKLIST

Preparing for your estate planning meeting helps ensure your attorney can create a plan that reflects your goals and protects your loved ones. Use this checklist to organize key information and documents before your appointment.

Attorney Name ______________________________

Phone ______________________________

Email ______________________________

PERSONAL & FAMILY INFORMATION

- ☐ Full legal names, birthdates, and contact information for you and your spouse/partner
- ☐ Names and birthdates of children or dependents
- ☐ Notes on any special family circumstances (e.g., blended families, dependents with special needs)

INSURANCE & BENEFICIARY REVIEW

- ☐ Copies or summaries of life insurance policies
- ☐ Review and note beneficiaries for:
  - ☐ Life insurance
  - ☐ Retirement accounts
  - ☐ Investment accounts

FINANCIAL INFORMATION

LIST OF ASSETS, INCLUDING:

- ☐ Real estate (home, land, vacation property)
- ☐ Bank accounts (checking, savings, CDs)
- ☐ Investment accounts (stocks, bonds, mutual funds)
- ☐ Retirement accounts (401(k), IRA, pensions)
- ☐ Business ownership or interests
- ☐ Personal property of significant value (vehicles, jewelry, art, etc.)

LIST OF DEBTS & OBLIGATIONS, SUCH AS:

- ☐ Mortgages and home equity loans
- ☐ Credit cards and personal loans
- ☐ Student loans or other liabilities

GUARDIANSHIP & DEPENDENTS

- ☐ Decide who you would like to name as guardian(s) for minor children or dependents
- ☐ Consider backup guardians in case your first choice cannot serve

CHARITABLE GIVING & LEGACY GOALS

- ☐ Identify any charitable organizations or causes you'd like to support
- ☐ Consider leaving specific gifts or bequests to individuals or charities

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WHO DO YOU TRUST?

- [ ] Identify someone you trust as an agent for finances.
- [ ] Identify someone you trust as a healthcare agent (for your medical power of attorney)
- [ ] Identify someone you trust to administer your estate under your will
- [ ] Identify someone you trust to be your trustee.

Identify a backup in each position. Collect their full legal names and addresses

LOCATE & REVIEW DOCUMENTS

- [ ] Identification (driver's license, passport, etc.)
- [ ] Existing wills, trusts, or powers of attorney (if applicable)
- [ ] Property deeds or titles
- [ ] Recent financial statements
- [ ] Life insurance policies
- [ ] Business ownership documents

TIP:

Even if some details are incomplete, a recent review of your documents will help your attorney prioritize next steps.

KEY CONTACTS

NAMES AND CONTACT INFORMATION FOR:

- [ ] Current financial advisor or accountant
- [ ] Insurance agents
- [ ] Business partners
- [ ] Other relevant professionals

NOTES

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