

ESTATE PLANNING CHECKLIST

Documents to have available for your executor

Before your family can settle things with an estate lawyer, they will need access to the following information. Here is a checklist of documents you will need when planning for end-of-life.

- Last Will and Testament: Outline asset distribution and executor preferences.
- Revocable Living Trust: Transfer assets to a trustee for managed distribution.
- Beneficiary Designations: Keep updated for non-probate assets like life insurance and retirement accounts.
- Durable Financial Power of Attorney: Designate financial decision-maker if incapacitated.
- Durable Medical Power of Attorney: Designate a medical decision-maker if unable.
- Pet Trust: Create a trust for pet care after your death.

- Legal marriage certificate
- Social security card
- Medicare card
- Insurance information
- Current bills
- Driver's license
- Life Insurance Policy
- Employment benefits
- Summary of assets
- Real estate deeds
- Retirement plans
- Stocks and bonds
- Joint bank accounts
- Logins and Passwords to online accounts

Healthcare and End-of-Life Preferences:

- Living Will (Advance Directive): Specify end-of-life medical preferences.
- Life Insurance: Ensure financial support for loved ones.
- DNR and POLST Forms: Clarify emergency medical preferences.
- End-of-Life Housing Preferences: Outline care preferences for home or hospice.

Digital and Funeral Planning:

- Instructions for Digital Assets: Detail management of online accounts after death.
- Funeral and Burial Instructions: Specify wishes for services, cremation, or burial.
- Organ Donation: Register as an organ donor and communicate wishes.
- Family Communication: Share plans with loved ones for awareness.

Safe Online Resource:

- The U.S. Will Registry: (Free) Store location of registered wills and documents for later access.
- Self-Proving Affidavit (Free on The U.S. Will Registry)
- Sidedrawer.com (Free iCloud Storage): Secure digital copies and inform family of access location.