

ESTATE PLANNING CHECKLIST

1. List assets and debts

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Include property, bank accounts, investments, insurance and outstanding loans.

2. Review retirement and insurance plans

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Ensure beneficiaries are up-to-date and coverage fits your needs.

3. Choose an executor

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Select someone you trust to carry out your wishes.

4. Write a will

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Outline how you want your assets to be distributed.

5. Consider a trust

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Trusts can be useful for minimizing taxes or protecting specific assets.

6. Set up advance directives

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Include a medical directive and appoint power of attorney for health and finances.

7. Make it legally binding

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Have documents prepared or reviewed by an attorney.

8. Store documents safely

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Keep originals in a secure place and let a trusted person know where to find them.