

Estate Planning Checklist

Estate planning is the best way to ensure that your loved ones are cared for after you pass away. By creating your estate plans early, and talking to your personal representatives about their roles, you can give yourself, and your family, the benefit of peace of mind.

Set Your Estate Planning Goals

- Determine who you would like to leave assets to
- Have representatives in mind
- Consider guardians for your children and pets
- Plan out gift recipients or donations to charities

Document Your Assets and Debts

List all assets, such as:

- Real estate titles and their balances
- Business shares and values
- Investments
- Banking information, such as checking and savings account balances
- Vehicles and their current worth

List all debts, such as:

- Credit card balances
- Loan balances
- Mortgages
- Money owed on vehicles

Select Your Executor and Attorney-in-Fact

- Speak to potential representatives
- Explain responsibilities to representatives
- Ensure that representatives are willing to perform necessary tasks
- Inform representatives of your current estate plans and goals
- Inform family of your chosen representatives

Consider Your Medical and Care Preferences

Physical and care preferences to consider are:

- What you would like to do with your remains
- Whether or not you would like to donate organs
- If you authorize palliative care or the use of life-saving tools, such as resuscitation devices
- Who you would like to make health care decisions on your behalf

Create Your Documents

- [Last Will and Testament](#)
- [Power of Attorney](#)
- [Health Care Directive](#)
- [End-of-Life Plan](#)

Gather Important Paperwork

Make sure to have copies of:

- Real estate titles and deeds
- Share certificates
- Proof of ownership for vehicles and other high-valued assets
- Marriage, divorce, and separation documents
- Adoption and/or birth certificates (for all of your children)
- Last Will and Testament
- Power of Attorney
- Gift Deed(s)
- Health Care Directive
- End-of-Life Plan

Include a list of passwords for your digital accounts, such as:

- Social media accounts
- Bank accounts
- Online business or real estate portfolios

Store Your Estate Plans in a Safe Place

Have copies of your documents for:

- Yourself
- Your attorney
- Your representatives

And store them in a safe place, such as:

- A safe
- A safety deposit box
- A trustee company
- With a bank, an accountant, or an attorney

And don't forget to:

- Inform your representatives of codes or combinations to access the documents

Keep Your Estate Plan Up-to-Date

Update your estate plans if you:

- Get married, divorced, or separated
- One of your representatives passes away
- One of your beneficiaries passes away
- Purchase or sell assets
- Lose or acquire debt
- Have any biological or adopted children

The key to good estate planning is communication. Make sure that your family, friends, and representatives are aware of your plans, and where your documents are located.

Be clear and consistent throughout your plans to make sure that your beneficiaries are left with as little hassle as possible, while still maintaining your wishes and goals.

For a more detailed explanation of estate planning, read:

[Your Guide to Estate Planning: The Decisions, Documents, and Delegations You Need to Make](#)

[For all of LawDepot's Estate Planning documents, click here.](#)