ESTATE PLANNING PREPAREDNESS CHECKLIST

PREMIER LEGACY LAW

If something were to happen to you, would your loved ones know where to find your personal, financial, medical, and estate planning documents and information?

Estate planning is essential for protecting your loved ones and ensuring your wishes are honored. This checklist will help you gather and organize the necessary information and documents that will help provide clarity to your loved ones during difficult times. You can also use it as a guide to prepare for your initial meeting with an estate planning attorney or to review and update an existing plan.

FINANCIAL INFORMATION

- ☐ Bank accounts
- ☐ Investment accounts
- ☐ Life insurance policies
- ☐ Real estate holdings (addresses, deeds, and mortgage information)
- ☐ Retirement accounts/pension plans
- ☐ Business ownership documents (operating agreements, stock certificates, etc.)
- ☐ Outstanding debts (loans, credit cards, personal debts)
- ☐ Copies of completed beneficiary designation forms for accounts with named beneficiaries
- ☐ Contact information for your tax preparer
- ☐ Contact information for your financial advisor

CONTACT INFORMATION

- ☐ Name and contact information for your spouse or significant other
- ☐ Name and contact information for your children
    - ☐ Contact information for children's medical providers and school contacts
- ☐ Pet's schedule, contact information for veterinarian, and medication information
- ☐ Name and contact information for your existing trusted decision makers
    - ☐ Personal representative
    - ☐ Trustee
    - ☐ Agent under a financial power of attorney
    - ☐ Agent under a medical power of attorney
    - ☐ Authorized person on a HIPAA authorization form
    - ☐ Guardian for your minor child(ren)

ESTATE PLANNING DOCUMENTS

- ☐ Last will and testament or pour-over will
- ☐ Revocable living trust agreement
- ☐ Financial power of attorney
- ☐ Medical power of attorney
- ☐ Advance directive or living will
- ☐ HIPAA authorization form
- ☐ Guardian nomination document for minor child(ren)
- ☐ Disposition of last remains/memorial instructions
- ☐ Memorandum or instructions regarding tangible personal property
- ☐ Copy of any will or trust that you are a beneficiary of or you expect to be a beneficiary of in the future

DIGITAL ASSETS

- ☐ List of online accounts (email, social media, etc.)
- ☐ Digital storage accounts
- ☐ Online banking or payment platforms (PayPal, Venmo, cryptocurrency wallets, etc.) and access instructions
- ☐ E-commerce accounts (eBay, Amazon, etc.), subscription services, and memberships
- ☐ Domain names and websites owned, including hosting account details
- ☐ Digital photo or video libraries
- ☐ Instructions for the management or transfer of digital files
- ☐ Login credentials (stored securely)

ADDITIONAL DOCUMENTS

- ☐ Health insurance card(s)
- ☐ List of valuable artwork, collectibles, family heirlooms, and jewelry
- ☐ Insurance policies (home, auto, umbrella, etc.)
- ☐ Information regarding the ownership of titled assets such as vehicles, boats, and large machinery
- ☐ Location and contact information of safe deposit boxes
- ☐ Assisted living and long-term care facility contracts
- ☐ Long-term care/disability benefits
- ☐ Burial or cremation agreements
- ☐ Any other legal documents or important records

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