

Estate planning checklist

The documents most adults should have, and where to keep them.

CORE DOCUMENTS

- ☐ Last will and testament
- ☐ Financial power of attorney
- ☐ Health care proxy / medical power of attorney
- ☐ Living will (advance directive)
- ☐ Guardian named for minor children
- ☐ Trust, if your situation calls for one

CHECK AND UPDATE

- ☐ Beneficiaries on retirement accounts and life insurance
- ☐ Payable-on-death and transfer-on-death designations
- ☐ Joint accounts and property titles
- ☐ Update after marriage, divorce, a birth, a death or a move to another state

LEAVE A MAP

- ☐ List of accounts, policies and where documents are kept
- ☐ Contact details for your executor and agents
- ☐ Digital accounts and how to reach them
- ☐ Tell your executor where the originals are