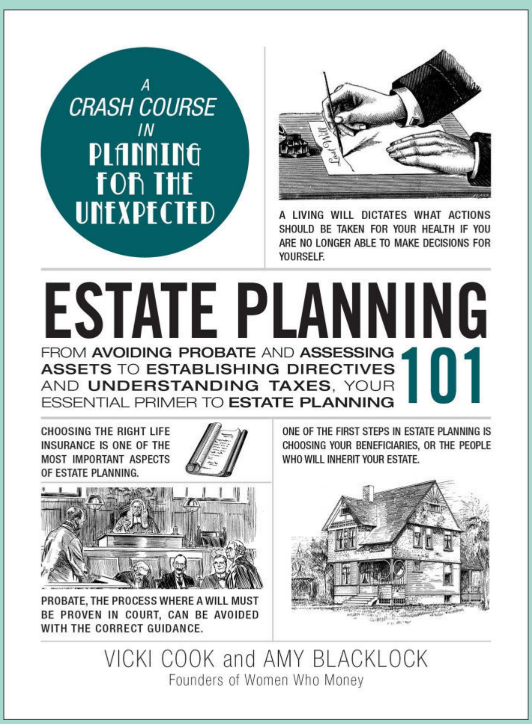
Estate Planning 101 Checklist

Use this checklist when doing your estate planning - even when working with an attorney – to help ensure you're covering all your bases.

(Pages 235-236 of the book)



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- [ ] **Establish estate plannng goals**
- [ ] **Inventory assets**
- [ ] **Inventory liabilities**
- [ ] **Inventory digital assets, profiles and passwords**
- [ ] **Evaluate disability insurance needs and purchase policy**
- [ ] **Evaluate life insurance needs and purchase policy**
- [ ] **Designate beneficiaries or transfer/payable on death for:**
  - [ ] **life insurance**
  - [ ] **IRAs**
  - [ ] **401(k), 403(b), etc.**
  - [ ] **bank accounts**
  - [ ] **investment accounts**
  - [ ] **stocks**
  - [ ] **bonds**
- [ ] **Create a living will/advance care directive (medical POA)**
- [ ] **Obtain general financial power of attorney**
- [ ] **Draft will**
- [ ] **Create living trust if applicable**
- [ ] **Fund living trust if applicable**
- [ ] **Consider lifetime gifting strategy**
- [ ] **Consider donor-advised fund or charitable remainder trust**
- [ ] **Create a business succession plan if applicable**
- [ ] **Plan for long-term care**
- [ ] **Plan for end-of-life and funeral arrangements**
- [ ] **Write letters of instruction for executor, guardian, & trustees**
- [ ] **Write letters to family and friends**
- [ ] **Assemble In Case of Emergency (ICE) Binder**
- [ ] **Secure originals, safely store copies, & provide copies as needed**
- [ ] **Calendar dates for ongoing review and plan management**