

Estate Planning Checklist

Congratulations on starting your estate planning journey!

This checklist is a guide to get you started – you may not need all the items here, so consider your own situation and wishes to determine what documents you need.

Disclaimer: *Individual circumstances and state laws vary. Only undertake estate planning with the help of an attorney licensed in your state.*

Prepare

- Talk to an attorney or an estate planner
- Speak with your family
- Choose your emergency contacts
- Find a secure but accessible place to store documents

Gather Important Documents

- Social Security card
- Birth certificate
- Certificates of marriage, divorce, citizenship, or adoption
- Education records
- Employment records
- Military records
- Property deeds
- Car title and registration
- Medicare/Medicaid information
- Copy of most recent income tax return

Create a Vital Information Document

- Legal residence
- Names and addresses of spouse and children
- Names and phone numbers of religious contacts (*if applicable*)
- Names and phone numbers of close friends, relatives, doctors, lawyers, and financial advisors
- Medications taken regularly (*keep this updated!*)
- Sources of income and assets – pension from your employer, IRAs, 401(k)s, interest, royalties, etc.
- Insurance information (*life, health, long-term care, home, etc.*) with policy numbers and agents' names and phone numbers
- Location of most up-to-date will with an original signature
- Liabilities, including property tax
- Mortgages and debts
- Credit and debit card names and numbers
- Location of safe deposit box and key

Set Up Legal and Medical Documents

- Legal Power of Attorney
- Financial Power of Attorney
- Healthcare Power of Attorney
- Living Will

Make a Plan for Your Assets

- Will
- Living Trust

○ Take Care of Your Digital Estate

- Personal email accounts
- Online bank and brokerage accounts (*including credit cards, retirement plans, loans, insurance, etc.*)
- Social media accounts (*Facebook, Twitter, Instagram, LinkedIn, etc.*)
- Websites you may own (*WordPress, Tumblr, Blogger, Squarespace, etc.*)
- Online retail accounts (*including eBay, Amazon, and iTunes*)
- Photo- or video-sharing sites like YouTube or Flickr
- Music sites (*Spotify, iTunes, Pandora, etc.*)
- Subscription sites (*like Disney+, Netflix, Hulu, Amazon Prime, etc.*)
- PayPal, Venmo, CashApp, or other online payment accounts
- Utility bills you may pay online
- And a multitude of other things (*frequent flier accounts, fitness app accounts, etc.*)

○ Plan Ahead for Your Funeral

- Contact your local funeral service provider
- Keep detailed records (*check out this [Funeral Planning Checklist](#) for a place to start*)
- Plan for the cost