

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 (*including current employer name and contact information, if applicable*)
- ☐ Military records
- ☐ Property deeds
- ☐ Landlord's name and contact information
- ☐ Car title and registration
- ☐ Medicare/Medicaid information
- ☐ Copy of most recent income tax return
- ☐ List of utility companies

☐ 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

- ☐ Durable Power of Attorney (*or separate legal, financial, or medical POAs*)
- ☐ Living Will
- ☐ Healthcare Directives

☐ Make a Plan for Your Assets

- ☐ Will
- ☐ Trust Documents

○ 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
- Meet with a preplanning specialist
- Keep detailed records of your wishes (*check out this [Funeral Planning Checklist](#) for more details*)
 - Choose a type of disposition
 - Choose a service type
 - Consider ways to personalize
 - Pick a final resting place
- Plan for the cost



www.funeralbasics.org
©2025 Funeral Basics

TX: For more information regarding prepaid funerals and consumer rights and protections under Texas state law, visit www.prepaidfunerals.texas.gov.

CA/WI: Should you respond to this advertising, an insurance-licensed funeral director or prearrangement specialist may contact you with information regarding an insurance policy or annuity underwritten and administered by Funeral Directors Life Insurance Company, Abilene, Texas.