



ESTATE PLANNING CHECKLIST

Organize Your Assets, Documents, and Decisions

Use this checklist to prepare for creating or updating your estate plan. Gathering this information ahead of time makes the planning process faster, more accurate, and more cost-efficient.

1) PERSONAL INFORMATION

- Full legal name
 - Date of birth
 - Social Security number
 - Marital status
 - Prior marriages
 - Citizenship status
 - Primary residence address
 - Contact information
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2) FAMILY & BENEFICIARIES

List all individuals who may be involved in your estate plan.

- Spouse
- Children (biological, adopted, stepchildren)
- Grandchildren
- Dependents
- Pets
- Other beneficiaries

For each, gather:

- Full legal name
- Date of birth



- Address
 - Relationship
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3) GUARDIANSHIP (IF YOU HAVE MINOR CHILDREN)

- Primary guardian selection
 - Alternate guardian
 - Temporary guardian
 - Special instructions for upbringing
 - Financial management preferences
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4) FIDUCIARY APPOINTMENTS

Who will manage your affairs?

Executor / Personal Representative

- Primary
- Alternate

Trustee

- Primary
- Successor

Power of Attorney Agent

- Financial
- Healthcare

Gather:

- Full name
 - Contact info
 - Relationship
-



5) REAL ESTATE

List all property you own.

- Primary residence
- Rental properties
- Vacation homes
- Out-of-state property
- Land / farm ground

For each property:

- Address
- Estimated value
- Mortgage balance
- Ownership type
- Deed status

6) BANK ACCOUNTS

- Checking accounts
- Savings accounts
- Credit unions
- Money market accounts

Gather:

- Institution name
 - Approximate balance
 - Joint or individual
 - Beneficiary designation
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7) INVESTMENT & RETIREMENT ACCOUNTS

- Brokerage accounts
- Stocks / bonds
- Mutual funds
- 401(k)
- IRA / Roth IRA
- Pensions

Gather:

- Custodian
 - Beneficiaries
 - Estimated value
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8) LIFE INSURANCE

- Term policies
- Whole life
- Employer policies

Gather:

- Carrier
 - Policy value
 - Beneficiaries
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9) BUSINESS INTERESTS

- LLC ownership
- Partnerships
- Corporations
- Professional practices

Gather:



- Ownership %
 - Operating agreements
 - Buy-sell agreements
 - Succession plans
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10) PERSONAL PROPERTY

- Vehicles
- Boats / RVs
- Firearms
- Jewelry
- Collectibles
- Family heirlooms

Note high-value items separately.

11) DIGITAL ASSETS

- Email accounts
- Social media
- Cryptocurrency
- Online businesses
- Cloud storage
- Domain names

Gather login access instructions (stored securely).

12) DEBTS & LIABILITIES

- Mortgages
- Auto loans
- Credit cards
- Student loans
- Business loans



Include:

- Creditor
 - Balance
 - Monthly payment
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13) EXISTING ESTATE DOCUMENTS

Do you already have:

- Will
- Trust
- Power of Attorney
- Healthcare Directive
- Living Will
- Beneficiary Deeds

Bring copies for review.

14) TRUST FUNDING (IF APPLICABLE)

- Real estate transferred
 - Bank accounts retitled
 - Investment accounts retitled
 - Business interests assigned
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15) DISTRIBUTION PLANNING

How should assets pass?

- Equal to children
- Staggered ages
- Specific gifts
- Charitable donations
- Trust protections



16) SPECIAL PLANNING CONCERNS

- Special needs beneficiary
- Spendthrift beneficiary
- Addiction concerns
- Creditor protection
- Divorce protection
- Long-term care planning

17) INCAPACITY PLANNING

- Financial power of attorney
- Healthcare power of attorney
- Living will
- HIPAA authorization
- Guardianship preferences

18) FINAL ARRANGEMENTS

- Burial or cremation
- Funeral preferences
- Prepaid arrangements
- Obituary instructions

19) DOCUMENT STORAGE

Where are documents stored?

- Home safe
- Safe deposit box
- Attorney file
- Digital vault

Ensure fiduciaries know access procedures.



Organizing this information is the first step toward creating a comprehensive estate plan that protects your family and simplifies estate settlement.

If you're ready to turn this checklist into a fully executed estate plan, schedule a consultation to begin the process.