Estate Planning Checklists

Living Will
Do Not Resuscitate (DNR) Water PoLST or MOLST Phone
POLST or MOLST
Organ donation consent
Any Professionals Consulted Internet
Lawyer
Accountant Life Insurance, including death benefits and cash value Insurance agent Health Insurance Health Insurance Health Insurance Health Insurance Home Insu
Health Insurance agent Health Insurance Health Insurance Health Care providers Car Insurance Home Insurance Home Insurance Grand Insurance Home Insurance Grand Insurance Home Insurance Grand Insurance G
Healthcare providers Car Insurance Home Insurance Financial planner Home Insurance Home Insuranc
Financial planner
Banker
Automatically Renewing Medications Investment Portfolios and their values Stocks Name of pharmacy where medications are renewed Bonds Mutual funds Bank Accounts, including balances Last Will And Testament Copy of the will Copy of any attachments to the will, such as: - Personal property memorandum - Digital assets memorandum - Digital assets memorandum Copies of previous versions of the will Mamberships Mamberships Mark Pay-on-death bank accounts Mortgages or Loans Mortgages or Loans Company through which mortgage or loan was given Account, such as Coinbase Account, such as Coinbase Master Recent account statements Mostrecurrency Income tax returns for the current and previous year, including 1040 variations and 1099s, if applicable Gift tax returns Personal Property Memorandum vib Any Property Memorandum vib Any Property Memorandum vib Any Property Memorandum vib Any Property Memorandum vib Any Property Memorandum vib Any Property Memorandum vib Any Property Memorandum vib Intels or Deeds to Any Property Memorandum vib Intels or Deeds to Any Property Memorandum with Titles or Deeds to Any Property Memorandum with Titles or Deeds to Any Property Memorandum with Titles or Deeds to Any Property
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Name of pharmacy where medications are renewed Bonds Mutual funds
Name of doctor who prescribed medication
Bank Accounts, including balances Checking accounts Checking accounts Copy of the will Copy of any attachments to the will, such as: Personal property memorandum Digital assets memorandum Digital assets memorandum Copies of previous versions of the will Mame of attorney or law firm that helped create the will, if applicable Memberships Life insurance policies Health Savings Accounts Annuities Retirement plans, pensions, IRAs, and 401(k)s Pay-on-death bank accounts Transfer-on-death (TOD) property Stocks, bonds, real estate, or vehicles Any other property with a title or deed Cryptocurrency Account, such as Coinbase Account, such as Coinbase
Checking accounts
Savings accounts Money market accounts Certificates of deposit (CDs) Debit cards Corresponding PIN numbers, if needed Beneficiary Designation Form Life insurance policies Health Savings Accounts Health Savings Accounts Health or other similar clubs Fraternal organizations, such as Lions, Rotary, and Shriners Retirement plans, pensions, IRAs, and 401(k)s Pay-on-death bank accounts Transfer-on-death (TOD) property Stocks, bonds, real estate, or vehicles Any other property with a title or deed Cryptocurrency Account, such as Coinbase Value of any Bitcoin, Ethereum, Litecoin, Bitcoin Cash, etc. Credit Cards Recent account statements Coppy of any attachments to the will, such as: Personal property memorandum Digital assets memorandum Copies of previous versions of the will Name of attorney or law firm that helped create the will, if applicable Memberships AARP Health or other similar clubs Fraternal organizations, such as Lions, Rotary, and Shriners VA Mortgages or Loans Company through which mortgage or loan was given A copy of the mortgage or loan agreement Tax Returns Most recent W-2 forms or federal self-employment tax return Income tax returns for the current and previous year, including 1040 variations and 1099s, if applicable Gifft tax returns Personal property Memorandum with Titles or Deeds to Any Property
Money market accounts
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Corresponding PIN numbers, if needed applicable
Beneficiary Designation Form Life insurance policies
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Recent account statements Personal Property Memorandum with Titles or Deeds to Any Property
to Any Property
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☐ Login and password information for online account management ☐ Real estate
☐ If signed up for automatic payments ☐ Motor vehicles
Email Username and Password
☐ Gmail ☐ Jewelry & artwork
☐ Hotmail
☐ Hotmail ☐ Yahoo! Mail
Houmaii

Trusts/Living Trusts	Power Of Attorney - Financial
☐ Declarations of trust or trust agreements	☐ Name of the person appointed to Power Of Attorney
☐ Name of attorney or law firm that helped create the	☐ Power Of Attorney documentation
trust, if applicable	☐ Name of attorney or law firm that helped create the POA,
☐ Bank accounts or other assets associated with the	if applicable
trust	Proof of Identity and Relationships
Beneficiary Designation form	Social Security card
Amendment and Restatement of Trust	Armed Forces discharge papers
Pour-over Will to appoint guardian and account for other unnamed assets	☐ Birth certificate
☐ Trustee Designation form, including choice of backup	Death certificate
Online Businesses and Shopping Accounts	Marriage certificates
Amazon	☐ Divorce certificates
☐ PayPal	Prenuptial agreements
☐ Ebay	☐ Divorce settlements
any other site that has your credit card information	Safe Deposit Boxes
Passwords, Usernames, Domain Names, Account	Location of safe deposit boxes
Numbers, etc.	Safe deposit box keys or location of safe deposit box keys
☐ Files containing financial and estate information	Having access to a safety deposit box does not imply entitlement to the contents.
Active websites, such as online shopping, multimedia, and subscription	Social Media Accounts with instructions on what to do with the accounts
Computer and smartphone, to find the contact	☐ Facebook
information for friends and colleagues	☐ Twitter
Patient portals	LinkedIn
Pension Plans and Retirement Benefit Information,	etc.
including account numbers	Funeral Instructions
401(k) or 403(b) plans	Prepaid funeral information
☐ IRAs	Burial or Cremation instructions
Roth IRAs	Obituary
Simplified Employee Pension (SEP) plan	Obituary
Salary Reduction Simplified Employee Pension (SARSEP) plan	
☐ VA pensions	
Other Estate Planning Measures Needing Documentation	
 ☐ College Investing Plan Accounts ☐ Deathbed Gifts ☐ Estate Freeze Intentionally Defective Grantor Trusts Convert Common Stock to Preferred Stock Grantor Retained Annuity/Estate Freeze Trust for Family Businesses 	 ☐ Joint Ownership - Joint Tenant - Tenants by the Entirety - Community property - Tenant in Common ☐ Mirror, Mutual, or Joint Will ☐ Provisions for your pets
Ethical Will	