

# Estate Planning Checklists

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## Advance Directive

- Living Will
- HealthCare Proxy
- Do Not Resuscitate (DNR)
- POLST or MOLST
- Organ donation consent

## Any Professionals Consulted

- Lawyer
- Accountant
- Insurance agent
- Healthcare providers
- Financial planner
- Banker

## Automatically Renewing Medications

- Names of medications
- Name of pharmacy where medications are renewed
- Name of doctor who prescribed medication

## Bank Accounts, including balances

- 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
- 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
- Value of any Bitcoin, Ethereum, Litecoin, Bitcoin Cash, etc.

## Credit Cards

- Card number
- Expiration date
- Recent account statements
- Login and password information for online account management
- If signed up for automatic payments

## Email Username and Password

- Gmail
- Hotmail
- Yahoo! Mail
- AOL
- etc.

## Household Utilities with estimated costs

- Electricity
- Gas
- Water
- Phone
- Cable
- Internet

## Insurance Policies and premiums

- Life Insurance, including death benefits and cash value
- Health Insurance
- Car Insurance
- Home Insurance
- Other Insurance policies (theft, fire, earthquake, etc.)

## Investment Portfolios and their values

- Stocks
- Bonds
- Mutual funds

## Last Will And Testament

- Copy of the will
- Copy 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
- Remaining balance

## 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
- Gift tax returns

## Personal Property Memorandum with Titles or Deeds to Any Property

- Real estate
- Motor vehicles
- Boats
- Jewelry & artwork
- etc.

### Trusts/Living Trusts

- Declarations of trust or trust agreements
- Name of attorney or law firm that helped create the trust, if applicable
- Bank accounts or other assets associated with the trust
- Beneficiary Designation form
- Amendment and Restatement of Trust
- Pour-over Will to appoint guardian and account for other unnamed assets
- Trustee Designation form, including choice of backup

### Online Businesses and Shopping Accounts

- Amazon
- PayPal
- Ebay
- any other site that has your credit card information

### Passwords, Usernames, Domain Names, Account Numbers, etc.

- Files containing financial and estate information
- Active websites, such as online shopping, multimedia, and subscription
- Computer and smartphone, to find the contact information for friends and colleagues
- Patient portals

### Pension Plans and Retirement Benefit Information, including account numbers

- 401(k) or 403(b) plans
- IRAs
- Roth IRAs
- Simplified Employee Pension (SEP) plan
- Salary Reduction Simplified Employee Pension (SARSEP) plan
- VA pensions

### Power Of Attorney - Financial

- Name of the person appointed to Power Of Attorney
- Power Of Attorney documentation
- Name of attorney or law firm that helped create the POA, if applicable

### Proof of Identity and Relationships

- Social Security card
- Armed Forces discharge papers
- Birth certificate
- Death certificate
- Marriage certificates
- Divorce certificates
- Prenuptial agreements
- Divorce settlements

### Safe Deposit Boxes

- Location of safe deposit boxes
- Safe deposit box keys or location of safe deposit box keys
- Having access to a safety deposit box does not imply entitlement to the contents.

### Social Media Accounts with instructions on what to do with the accounts

- Facebook
- Twitter
- LinkedIn
- etc.

### Funeral Instructions

- Prepaid funeral information
- Burial or Cremation instructions
- Obituary

## 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
- Ethical Will
- Joint Ownership
  - Joint Tenant
  - Tenants by the Entirety
  - Community property
  - Tenant in Common
- Mirror, Mutual, or Joint Will
- Provisions for your pets