Estate Planning Checklists

**Advance Directive**
- Living Will
- Health Care 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

**Cryptography**
- 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.
<table>
<thead>
<tr>
<th>Trusts/Living Trusts</th>
<th>Power Of Attorney - Financial</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Declarations of trust or trust agreements</td>
<td>- Name of the person appointed to Power Of Attorney</td>
</tr>
<tr>
<td>- Name of attorney or law firm that helped create the trust, if applicable</td>
<td>- Power Of Attorney documentation</td>
</tr>
<tr>
<td>- Bank accounts or other assets associated with the trust</td>
<td>- Name of attorney or law firm that helped create the POA, if applicable</td>
</tr>
<tr>
<td>- Beneficiary Designation form</td>
<td></td>
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<tr>
<td>- Amendment and Restatement of Trust</td>
<td></td>
</tr>
<tr>
<td>- Pour-over Will to appoint guardian and account for other unnamed assets</td>
<td></td>
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<tr>
<td>- Trustee Designation form, including choice of backup</td>
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<tr>
<td>Online Businesses and Shopping Accounts</td>
<td></td>
</tr>
<tr>
<td>- Amazon</td>
<td></td>
</tr>
<tr>
<td>- PayPal</td>
<td></td>
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<tr>
<td>- Ebay</td>
<td></td>
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<tr>
<td>- any other site that has your credit card information</td>
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</tr>
<tr>
<td>Passwords, Usernames, Domain Names, Account Numbers, etc.</td>
<td><strong>Proof of Identity and Relationships</strong></td>
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<tr>
<td>- Files containing financial and estate information</td>
<td>- Social Security card</td>
</tr>
<tr>
<td>- Active websites, such as online shopping, multimedia, and subscription</td>
<td>- Armed Forces discharge papers</td>
</tr>
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<td>- Computer and smartphone, to find the contact information for friends and colleagues</td>
<td>- Birth certificate</td>
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<td>- Patient portals</td>
<td>- Death certificate</td>
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<td><strong>Pension Plans and Retirement Benefit Information, including account numbers</strong></td>
<td>- Marriage certificates</td>
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<td>- 401(k) or 403(b) plans</td>
<td>- Divorce certificates</td>
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<td>- IRAs</td>
<td>- Prenuptial certificates</td>
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<td>- Roth IRAs</td>
<td>- Divorce settlements</td>
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<td>- Simplified Employee Pension (SEP) plan</td>
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<td>- Salary Reduction Simplified Employee Pension (SARSEP) plan</td>
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<td>- VA pensions</td>
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