ESTATE PLANNING CHECKLIST	All Done	Needs Work
Have you reviewed your estate plan within the last year? (i.e., Wills, Trusts, Powers of Attorney) Have your wishes changed since you signed your estate planning docs?)		
If you or your spouse passed away today, are you confident that your property will be transferred as you wish?		
Have you named a guardian for your children under age 18 (or other dependents)?		
Is this a second marriage? If so, does your estate plan benefit your new spouse and any children from your previous marriage according to your desires?		
Have any of the following events occured after you signed your estate planning documents? If so, have you reviewed your documents after the event? Retirement Divorce Move to a different state Significant change in assets Death of a family member		
Is either spouse a non-US citizen? Have you addressed this with a knowledgeable estate planning attorney?		
Do you have unique assets, such as family owned business, real estate, vacation property or stock in a closely held business? Have you provided instructions for its transfer or disposition?		
Do you intend to benefit a charity? Does your estate plan reflect your intent?		
Do you have instructions regarding your funeral?		
Do you have a completed, signed and dated personal property memorandum (or another document that specifies who gets your personal property)?		
Have you taken steps to ensure that appropriate access to digital assets (E-mail, social media accounts, other online accounts.) will be permitted?		
Who will take care of your pets? How will they pay for the pet’s expenses?		
Select Who Will Manage Your Affairs after Your Death (Your “Fiduciaries”)		
Do you have the right executor/personal representative named in your Last Will & Testament?		
Do you have the right trustee(s) for trusts?		
Is your Executor/Personal Representative/Trustee aware of his or her nomination? Are they ready and willing to serve?		

ESTATE PLANNING CHECKLIST (Page 2)	All Done	Needs Work
Does your Executor/Personal Representative/Trustee know where to find your estate planning documents?		
Document Storage		
Have you stored copies of all your important estate planning documents in a safe and accessible place?		
Do you have the names and contact information of your important advisors in a central location?		
Do you have up-to-date bank, investment and financial account information kept in a central location?		
Tax Considerations		
Following your death will assets have to be sold to pay expenses or taxes?		
Are you taking advantage of the annual gift tax exclusion?		
Title and Beneficiary Review		
Are your assets titled consistently with your estate plan?		
Are the beneficiary designations on your insurance policies, bank accounts, retirement accounts and other assets up-to-date and coordinated with your estate plan?		
Prepare for Incapacity		
Do you have a plan in place that takes into consideration potential long-term care costs such as nursing home expenses?		
Have you thought whether you want a Do Not Resuscitate (DNR) order?		
Do you have a Financial Power of Attorney		
Do you have the right person named as agent in your Financial Power of Attorney document?		
Do you have the right person named as your Financial Power of Attorney agent?		
Do you have a Health Care Power of Attorney?		
Do you have a living will (advance medical directive)?		
Do you have HIPAA privacy waivers?		