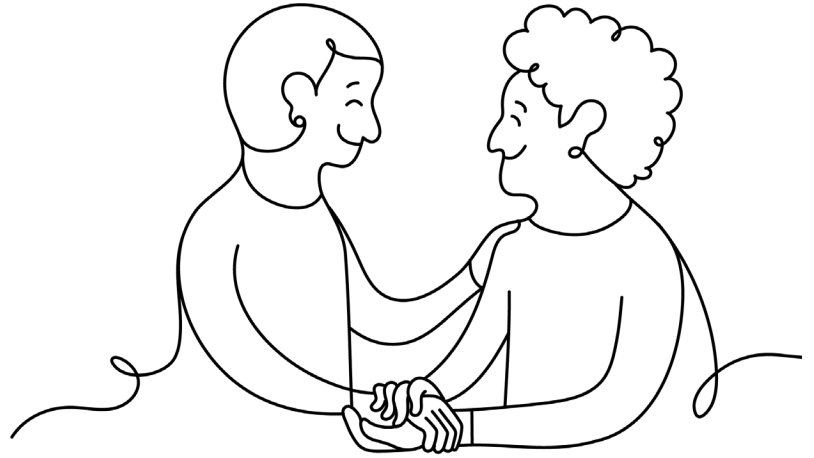


## The ultimate estate planning checklist



### ESTATE PLANNING STEPS TO TAKE NOW

1. List your estate planning goals.
2. Create a list of your assets, such as:
  - Property
  - Investments, like stocks and bonds
  - Retirement accounts
  - Insurance policies
  - Businesses
  - Jewelry
  - Artwork or other valuable collectibles
3. Gather necessary documents, place them in a safe deposit box, and name a designee who can access it. That person will need to know the name of the bank, account number, box number, and key location.
  - Personal identification, such as a birth certificate, passport, and marriage license
  - Financial power of attorney
  - Medical power of attorney
  - Will
  - Trust documentation
  - HIPAA authorization
  - Advanced healthcare directive
  - Tax documents
  - Debt summaries: loans and credit cards
  - Recurring bills
  - Divorce decree
  - Vehicle titles
  - A list of your digital assets.
4. Designate your beneficiaries

### ESTATE PLANNING DOCUMENTS NEEDED AFTER YOUR DEATH

- Preneed plan
- Will

### UPDATE YOUR ESTATE PLAN, AS NECESSARY

1. Have an estate planning attorney review your will.
2. Go over your plan with your spouse, children, and other beneficiaries.
3. Update your will if:
  - Your financial status changes, such as a divorce, birth, remarriage, or purchase or sale of property
  - You change your mind about who should have custody of your children if something happens to you
  - You wish to add or remove a beneficiary
  - A person you named to be your power of attorney or executor of your will can no longer serve the role
4. Review your insurance coverage regularly. Check that your life insurance plan adequately meets your family's changing needs.