



# Estate Planning: Complete Checklist

Avoid confusion about getting your affairs in order with this comprehensive checklist.

## Starting the Journey

### Take inventory of all assets, like:

- Homes and property
- Vehicles, equipment and tools
- Appliances and electronics
- Furniture and knick-knacks
- Art, antiques and collectibles
- Clothing, jewelry and accessories
- Sentimental belongings
- Bank accounts
- Brokerage accounts
- Retirement accounts

### Note your memberships, like:

- Veterans associations
- High school/college alumni groups
- Professional associations
- Retirement networks
- Charitable organizations

### Transfer ownership of your assets

### Designate your beneficiaries

### Cover any outstanding debts

### Find an executor for your estate

## Getting Your Documents

- Get a last will and testament
  - Consider a living trust
  - Opt for a power of attorney
  - Get a living will
- Prepare for estate tax obligations
  - Organize your digital footprint
  - Make a statement of desires

## Maintaining Your Estate Plan

- Review and update documents periodically for:
  - Births
  - Deaths
  - Marriages
  - Divorces

Notable changes affecting your estate:

