

# Estate Planning: Complete Checklist

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

## **Starting the Journey**

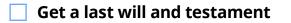
#### Take inventory of all assets, like:

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

- Note your memberships, like:
  - Veterans associations
  - O 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**



- Consider a living trust
- Opt for a power of attorney
- Get a living will



- Organize your digital footprint
- Make a statement of desires

## **Maintaining Your Estate Plan**

Review and update documents periodically for:



- Deaths
- Marriages
- Divorces

#### Notable changes affecting your estate:



