ESTATE READINESS CHECKLIST

“What Would Dad Want?” — Make Sure They Know.

Each year, families face uncertainty simply because wishes were never clearly shared. This checklist is your starting point to bring clarity, comfort, and confidence to your legacy planning—because clarity is the greatest gift you can give.

Personal & Legacy Clarity

- ☐ **Legacy Statement:** Have you written down what values, life lessons, or causes matter most to you?
- ☐ **Family Conversations:** Have you had an open conversation with your children or loved ones about your vision for your legacy?
- ☐ **End-of-Life Preferences:** Do your family members know your preferences for care, ceremonies, or memorials?
- ☐ **Personal Letters or Videos:** Have you created any personal messages to leave behind?

Legal and Financial Preparedness

- ☐ **Will & Testament:** Is your will current, signed, and stored in a known, accessible location?
- ☐ **Power of Attorney:** Have you designated someone to make decisions if you’re unable to?
- ☐ **Healthcare Directive:** Is there a living will or medical directive in place?
- ☐ **Beneficiary Review:** Have you reviewed and updated beneficiaries on insurance, retirement accounts, and bank accounts?
- ☐ **Trusts:** If applicable, are your trusts established and funded properly?

Document Organization

- ☐ **Centralized Document Storage:** Do your loved ones know where to find your essential documents?
- ☐ **Account Access:** Have you compiled a secure list of login credentials for digital accounts?
- ☐ **Contact List:** Is there a directory of key professionals (attorney, financial advisor, executor)?
- ☐ **Property & Asset Inventory:** Have you listed all real estate, vehicles, valuables, and business interests?

Family Peace of Mind

- ☐ **Review with Advisor:** Have you reviewed this checklist with a professional to ensure nothing is overlooked?
- ☐ **Share the Plan:** Have you clearly communicated your intentions with those affected?
- ☐ **Schedule Regular Reviews:** Is your estate plan reviewed at least annually or after life changes?

ESTATE PLANNING WORKBOOK

A PRACTICAL TOOL FOR ORGANIZING AND REVIEWING YOUR ESTATE PLANNING ESSENTIALS

Introduction

This workbook is designed to help you organize, review, and document the key components of your estate plan. Whether you're working with a financial advisor, attorney, or your family, this document can serve as a central resource to ensure your wishes are clearly defined, accessible, and up to date.

Use this workbook to reflect on your current plan, identify any gaps, and simplify communication between you and those responsible for carrying out your intentions.

Will & Trusts

- Do you have a current, legally valid will? ☐ YES ☐ NO
- Have you established any trusts? ☐ YES ☐ NO
- Are your trusts up to date? ☐ YES ☐ NO
- Have your beneficiaries been reviewed in the last 12 months? ☐ YES ☐ NO

Notes:

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Beneficiary Designations

Ensure all account beneficiary designations are current and consistent with your overall estate plan.

- Retirement Accounts (IRA, 401(k), etc.)
- Life Insurance Policies
- Bank Accounts
- Brokerage/Investment Accounts

Notes or List of Beneficiaries:

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Powers of Attorney

Personal, lasting words of love and wisdom meant for your children, spouse, grandchildren, or anyone special.

- Do you have a Financial Power of Attorney? ☐ YES ☐ NO
- Do you have a Medical/Healthcare Power of Attorney? ☐ YES ☐ NO
- Have you completed a HIPAA Release Form? ☐ YES ☐ NO

Designated Agents or Comments:

Advanced Healthcare Directives

Make your end-of-life wishes known clearly.

- Do you have a Living Will in place? ☐ YES ☐ NO
- Do you have DNR (Do Not Resuscitate) orders on file, if applicable? ☐ YES ☐ NO

Location of Documents or Instructions:

Tax Strategy

Review your estate's exposure to taxes and plan accordingly.

- Is your estate plan designed to minimize tax liabilities? ☐ YES ☐ NO
- Have you reviewed your estate tax exposure in the last 12–24 months? ☐ YES ☐ NO
- Have you consulted with a tax professional or estate planner? ☐ YES ☐ NO

Planning Notes:

Asset Inventory

Provide an overview of your major assets.

- Real Estate Holdings
- Business Interests
- Investment & Retirement Accounts
- Personal Property of Significant Value (art, collectibles, vehicles)

List or Inventory Notes:

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Digital Assets

Don't overlook your digital life.

- List of important online accounts (banking, subscriptions, social media)
- Access instructions, usernames, and passwords
- Have you created a digital asset access plan? ☐ YES ☐ NO

Storage Details or Instructions:

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Document Storage

Make sure your loved ones or executor can find what they need.

- Where are your estate planning documents stored? ______________________________
- Have you informed the appropriate people how to access them? ☐ YES ☐ NO
- Are copies stored securely and backed up? ☐ YES ☐ NO

Details/Instructions:

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Review & Update Cycle

Keep your plan current with life's changes.

- When was your plan last reviewed? ______________________________
- Have there been any recent life events (birth, marriage, divorce, death) that require updates?
  ☐ YES ☐ NO
- Do you have a system or reminder in place to review your plan regularly? ☐ YES ☐ NO

Next Review Date or Notes:

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