

Estate Planning Checklist

10 Steps to Get your Ducks in a Row!



1. Advance Directives

- ☐ Name a Healthcare Agent to make medical decisions in case you're incapacitated.
- ☐ Outline your medical wishes in a Living Will/ Directive to Physicians.
- ☐ Talk with your loved ones about your wishes.

3. Last Will & Testament

- ☐ Name an Executor and Contingent Executors to probate your will.
- ☐ Create an inventory of your personal property, and document who should receive specific items.
- ☐ Document how you want your assets distributed.

5. Beneficiary Designations

- ☐ Ensure your Beneficiary Designations such as 401(k), IRA accounts, life insurance policies are current.

7. Insurance & Accounts

- ☐ Organize your medical, dental, prescription, life, homeowners, renters, and car insurance policies.
- ☐ Make a list of your financial accounts & advisors including account numbers, passwords, etc.

9. Funeral & Burial Plans

- ☐ Share any pre-arrangements with the person you named as Executor of your Estate.
- ☐ Share your preferences for your funeral service with your faith leaders and loved ones.

2. Financial POA

- ☐ Name an Agent to make legal or financial decisions in case you're unavailable or incapacitated.
- ☐ Ensure your Financial Advisor and your Financial PoA communicate with one another.

4. Revocable Living Trust

- ☐ Name a Trustee and Contingent Trustees to manage your trust.
- ☐ Work with your Financial Advisor to ensure your property and assets are transferred into the Trust.

6. Identifying Documents

- ☐ Gather important documents such as your birth certificate, social security card, marriage certificate, divorce decree, military records.

8. Titles & Deeds

- ☐ Review the titles or deeds for your vehicles, home, boat, and other property.
- ☐ If you have a Living Trust, make sure all property has been retitled to the Trust.

10. Digital Assets

- ☐ Consider using a Password Manager to keep track of your accounts - but be sure to share the master password with your Executor.
- ☐ Don't forget email, social media, apps, & more.

What comes next? Now that you have your legal and financial ducks in a row, make sure you store this information in a safe and secure location, and share this information with your Executor, Trustee, Agents, or other loved ones. Your Executor will need to submit the signed original version of your Last Will to the Probate Court, so make it easily accessible. Review these documents & information regularly to ensure that everything stays up to date.

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Chapter 1retirement And Estate Planning

Stephan R. Leimberg



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The ABCs of Managing Your Money Jonathan D. Pond,Michael A. Dalton,O'Neill Wyss,1993 Presents information about financial planning in easy to understand format Provides practical worksheets and the tools necessary to begin planning for the future

Exit Strategy Planning John Hawkey,2017-07-05 For private business owners managing a successful exit from their business is one of the most important events in their business lives This book shows you how to do so with the minimum of fuss and maximum return It is unique because the author writes from the owner s point of view bringing together in one place all you need to know about planning this complex process Exit Strategy Planning emphasises the need to place exit planning on a firm foundation with taxation planning and business continuity planning providing the basis to ensure a smooth transition that will yield the maximum return The first three parts of the book Laying the Foundations Choosing your Exit Strategy and Preparing and Implementing your Plans present a best practice approach to this complex subject Here the book highlights the importance of planning often several years in advance and explains the need to make the business investor ready by identifying and removing impediments to sale Part 3 culminates in a step by step guide to producing and implementing your Master Exit Strategy Plan Following on from this the extensive appendices in Part 4 discuss in detail each of the exit options open to you many of which you have probably never considered and show how to choose the optimum exit route Exit Strategy Planning is a book that will do more than save you time and money now and in the future it will help you to maximise on what may well be a lifetime s investment

Introduction to Estate Planning in a Nutshell Robert J. Lynn,Grayson M. P. McCouch,2004 This Nutshell presents an introduction to estate planning Subjects covered include the transfer of property at death at will under the intestate law survivor interests community property and simple wills Addresses insurance estates arising from status Social Security pensions workers compensation and veterans benefits Discusses charitable trusts the rule in Shelley s case the Doctrine of Worthier Title the Rule Against Perpetuities and the Rule Against Accumulations Also addresses fiduciary administration and federal estate and gift taxes

The Tools & Techniques of Estate Planning Stephan R. Leimberg,1995

Make Yourself a Millionaire Charles Zhang,Lynn Zhang,2003-03-17 Easy to follow personal finance guidelines from American Express s 1 rated financial adviser Charles Zhang became one of today s most nationally known and trusted financial advisers by stressing sanity and sensible investing over dubious get rich quick tricks and schemes In Make Yourself a Millionaire Zhang transfers his program to the printed page Far from a confusing all or nothing approach this book outlines a clear and rational approach to organizing and planning all aspects of a financial life How do different investments work How much insurance is too much Zhang answers these questions and more as he discusses Recommended investments for virtually any portfolio Asset allocation techniques that work Actual examples of success and disaster The role of insurance as a key element in a portfolio All major financial instruments stocks bonds funds

REITs cash **Report on a Proposed Retirement Plan for Employees of the City of Baltimore** Baltimore (Md.). Retirement Commission,1925 *In re Brackett Estate; Morison v. Department of Revenue*, 342 MICH 195 (1955) ,1955 2

Fundamentals of Estate Planning Constance J. Fontaine,1997 **Fundamentals of Financial Planning** David Mark Cordell,1999 **CCH Estate Planning Guide Including Financial Planning** ,1987 New York Court of Appeals. Records and Briefs. New York (State)., **California. Court of Appeal (4th Appellate District). Division 2. Records and Briefs** California (State)., **Records & Briefs New York State Appellate Division** , *Projects for the Entrepreneur* Iris Blanc,Cathy Vento,2004-12 This workbook provides projects that require the creation of documents forms presentations worksheets databases Web sites and Outlook management tools for a new business *The Successful American's Guide to Financial Planning* Steven R. Kaye,1986

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