



# **FREE ESTATE PLANNING CHECKLIST**

# Free Estate Planning Checklist

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## 1. Introduction

Preparing your estate plan does not have to be overwhelming. This checklist is designed to help you organize your affairs step by step, giving you and your loved ones peace of mind, clarity, and security for the future.

## 2. Why Estate Planning Matters

Estate planning ensures your wishes are honored, your assets go where you want, and your family is protected. It can help avoid disputes, minimize taxes, and make things easier for your loved ones.

## 3. Your Estate Planning Checklist

### Will & Executor

- ☐ Create or update your will: decide who gets your property and belongings.
- ☐ Name an executor you trust to handle your estate.

### Living Trust

- ☐ Consider creating a living trust to help your family avoid probate and manage assets if you are unable.

### Power of Attorney

- ☐ Name someone to handle finances and legal matters if you cannot.
- ☐ Appoint a health care power of attorney for medical decisions.

### Advance Directives

- ☐ State your health care wishes (living will, DNR, etc.).
- ☐ Share these with your doctor and loved ones.

### Beneficiaries

- ☐ List beneficiaries on retirement accounts, life insurance, and bank accounts.
- ☐ Keep beneficiaries current.

## **Important Documents**

- [ ] Gather deeds, vehicle titles, insurance policies, birth/marriage certificates, Social Security cards, etc.
- [ ] Store documents safely and let a trusted loved one know where they are.

## **Digital Assets & Passwords**

- [ ] List key email, bank, and online account info.
- [ ] Provide access instructions for your executor.

## **Plan Review**

- [ ] Review and update plans after major life events (marriage, birth, move, etc.).

## **Communication**

- [ ] Talk openly with family and those named in your plans.

## **4. Important Tips**

- You do not have to do everything at once. Take it step by step.
- Use plain language and keep documents up to date.
- Review your checklist once a year.
- If unsure, seek advice from a professional or local senior resource center.

## **5. Resources**

- National Association of Estate Planners & Councils: [www.naepc.org](http://www.naepc.org)
- AARP Estate Planning: [www.aarp.org/estateplanning](http://www.aarp.org/estateplanning)
- Your state or county senior services office

## Find More Senior Resources:

<https://60andover.net>

*Disclaimer: This checklist is for informational purposes only and does not constitute legal, financial, or medical advice. For specific guidance, please consult with a qualified professional familiar with your needs and local laws.*