



Estate Planning Checklist

Estate Planning Issues

<input type="checkbox"/>	Does my Will or Trust accomplish all of my goals for my family and charities?
<input type="checkbox"/>	Are all of my beneficiary designations in place and do they accurately reflect my wishes?
<input type="checkbox"/>	Do I have meaningful or valuable personal items that should be on a list to go to specific people?
<input type="checkbox"/>	Are my Living Will and Healthcare Power of Attorney up to date?
<input type="checkbox"/>	Do I need a Durable Power of Attorney so someone can manage my affairs if I am incapacitated?
<input type="checkbox"/>	Do I want to avoid probate at my death and if so, how do I accomplish this?
<input type="checkbox"/>	Are all of my assets registered in the best way to transfer at my death?
<input type="checkbox"/>	Do I have beneficiaries who need a stream of income rather than a lump-sum inheritance?
<input type="checkbox"/>	Have I communicated to my heirs the location of important documents?
<input type="checkbox"/>	Are my advisors (legal, tax, financial, insurance) working together to coordinate my estate plan?
<input type="checkbox"/>	Have I prepared a letter of instruction for my executor or successor trustee?

Tax Planning Issues

<input type="checkbox"/>	Is my income tax rate less than my beneficiaries? If so, should I accelerate income to save my heirs money in taxes?
<input type="checkbox"/>	Is there an opportunity for stepped-up cost basis at my death by changing ownership on any assets?
<input type="checkbox"/>	Do I need to do anything to take advantage of the unified credit for estate taxes?
<input type="checkbox"/>	Do I have any carry-forward items, such as charitable donations and capital or passive losses, that I should use up?
<input type="checkbox"/>	Are my tax records organized for my personal representative at my death of incapacity?

Funeral and Final Expenses

<input type="checkbox"/>	What funeral decisions should I make and what expenses should I prepay?								
<input type="checkbox"/>	<table style="width: 100%; border: none;"> <tr> <td style="width: 25%;">Cemetery Lot</td> <td style="width: 25%;">Vault/Casket</td> <td style="width: 25%;">Flowers</td> <td style="width: 25%;">Music</td> </tr> <tr> <td>Service</td> <td>Memorial</td> <td>Funeral home</td> <td>Program</td> </tr> </table>	Cemetery Lot	Vault/Casket	Flowers	Music	Service	Memorial	Funeral home	Program
Cemetery Lot	Vault/Casket	Flowers	Music						
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<input type="checkbox"/>	Who should write my obituary and when? Who else should have input?								
<input type="checkbox"/>	Who should be contacted about my death and how?								

Legacy Creation

<input type="checkbox"/>	Have I adequately shared my values with the appropriate people in my life?						
<input type="checkbox"/>	<table style="width: 100%; border: none;"> <tr> <td style="width: 33%;">Work ethic</td> <td style="width: 33%;">Honesty and Integrity</td> <td style="width: 33%;">Appreciation</td> </tr> <tr> <td>Faith and Spirituality</td> <td>Philanthropy</td> <td>Communication</td> </tr> </table>	Work ethic	Honesty and Integrity	Appreciation	Faith and Spirituality	Philanthropy	Communication
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Faith and Spirituality	Philanthropy	Communication					
<input type="checkbox"/>	Do I need to document my family history and stories?						
<input type="checkbox"/>	Does my family need a mechanism or tradition for communication before and after my death?						
<input type="checkbox"/>	Are adequate plans in place to benefit charities important to me and should this happen before or after my death?						
<input type="checkbox"/>	Have I transferred my family leadership role to my heirs?						

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