Estate Planning Checklist

**Beneficiary Designations**

[ ]  Name a beneficiary for all non-probate assets:

* + - Retirement accounts
		- Life Insurance Policies
		- Pensions

**Last Will & Testament**

[ ]  Create a will and ensure that you update it regularly to ensure it continues to reflect your wishes.

**Power of Attorney**

[ ]  Grants someone permission to make decisions on your behalf.

[ ]  You can assign medical, legal, or financial power of attorney to the same or different individuals.

Several types:

* + Durable POA
	+ Springing POA
	+ General POA
	+ Medical POA (Health Care Proxy)
	+ Financial POA

**Advance Directive/Living Will**

[ ]  Specific your healthcare preferences

**Living Trusts**

[ ]  If you wish to control the distribution of your assets upon your death, consider a trust that would control the timing and manner in which assets are distributed to your beneficiaries.

**Create an Inventory**

[ ]  Create a balance sheet and a record of all accounts, passwords, retirement savings, life insurance policies, deeds, titles, and other financial information and review with your spouse, child, or executor regularly.