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.