



Estate Planning *Checklist*

Essential Legal Documents

- Last Will & Testament
- Trusts
- Living Will / Advance Directive
- Financial Power of Attorney
- Healthcare Power of Attorney
- Business Succession Plan

Review Your Beneficiary Designations

- Retirement Accounts
- Investment Accounts
- Bank Accounts
- Life Insurance Policies
- Health Savings Accounts
- Beneficiary Deed for Real Estate

One Location for Your Financial Records

- List of Assets & Liabilities
- Debts *(including credit cards & mortgages)*
- Life Insurance Policy
- Long-Term Care Insurance
- Social Security Benefits
- Account Logins & Passwords

Other Important Considerations

- Real Estate *(including vacation homes)*
- Safe Deposit Box(es) / Fire Safe(s)
- Charitable Bequests/Donations
- Guardianship for Minor Children
- Special Instructions for Pets
- Vehicles & Boats
- Precious Metals/Jewelry
- Collectibles
- Special Needs Planning
- Funeral or Burial Preferences

Questions? Danna McKitrick is Here to Help

Estate planning doesn't have to be overwhelming, but trying to do it alone can be. Our experienced attorneys can guide you through every step, ensuring nothing gets overlooked. Whether you're just getting started or updating your existing plan, we're here to help. Let's make sure your legacy, and your loved ones, are protected.

The choice of a lawyer is an important decision and should not be based solely upon advertisements.



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