Life, Estate, and Legacy Planning Checklist

This is a checklist[1] for creating, storing, and maintaining important legal documents to help you organize your records, protect your assets, achieve specific goals, and transition your property, values, and wealth.

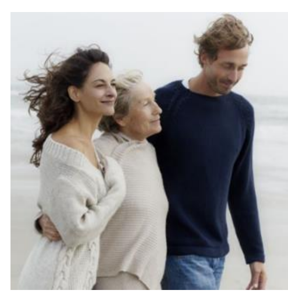
Life Documents

____1. Financial Plan based on your personal mission, goals, and resources.
____2. Incapacity Planning Documents:
   a. Springing or Durable Power of Attorney for financial assets with power to gift, establish trusts, and manage qualified plans.
   b. Springing or Durable Power of Attorney for Digital Assets
   c. Springing or Durable Power of Attorney for Specific Assets
   d. Springing or Durable Power of Attorney for Medical Decisions
   e. Living Will
   f. File with copies of current disability insurance, health insurance, and long-term care insurance policies/statements that pay benefits upon sickness, disability, or injury.
____3. Master file for Medical Records and annual credit reports.
____4. Master file that lists all assets, liabilities, and creditors, updated with annual statement
____5. Master paper file that lists passwords and websites for accessing your personal financial and digital data. Examples include cloud storage, data archive sites, family photo websites, email accounts, apple ID, Google ID, Facebook, LinkedIn, data aggregation tools, Quicken, and spreadsheet passwords. Can not be used by professional fiduciary.

Estate Documents

____1. Executed Last Will & Testament with properly named and competent executors and successors. (Original stored in safe place, copy accessible to executor). Can include a Testamentary Trust with IRS Look Through provisions to allow Executor and Trustee to manage RMD of beneficiaries.
____2. Trust documents with properly named trustees, successor trustees, and trust protectors with purpose statements to provide long-term guidance
____3. A file with copies of ownership titles for cars, homes, and real property
____4. Personal property assignment and gifts to family of specific estate items
____5. Specific trust provisions that are triggered due to "special needs"
____6. A file with current life insurance policies and related statements.
____7. A file with all current beneficiary designations

Legacy Documents and Gifts



____1. A **Legacy Message**™ of love, appreciation, and advice for those you leave behind that share stories, hopes, and goals. These are digitally recorded and archived (Video, Letters, Audio, etc.).
____2. Charitable Gifts, Family Foundations, Charity Accounts
____3. Irrevocable Trusts to control and fund legacy goals using third-party Trustees/Fiduciary
____4. Dynasty Trusts that provide education funds, life-style support, and medical funds for future generations to encourage positive productive behaviors.

[1] Descriptions of types and purposes of referenced documents and provisions are attached for educational purposes. Not to be considered tax or legal advice. Discuss ideas with attorney.