



Estate Planning Considerations

Here are some suggestions of topics to think about before meeting with an attorney to draft your estate planning documents.

1. Know what you own, how it is titled, and who is named as the beneficiary (if applicable). For example:
 - A. Real estate (including any located in a state other than where you live)
 - B. Bank accounts
 - C. Stocks and bonds
 - D. Annuities
 - E. Motor vehicles
 - F. Insurance policies
 - G. Retirement accounts (e.g., IRA, 401(k), pension)
 - H. Business interests
 - I. Money owed to you (e.g., debts, interests in any trusts)
 - J. Anticipated inheritances
 - K. Collectibles
 - L. Intellectual property (e.g., patents, trademarks, copyrights)
2. If you have minor children, who do you want to raise them? Who do you want to be responsible for safeguarding any assets left to the child(ren)? Do you want the child(ren) to receive the assets in full at 18 or do you want them doled out over time?
3. When naming someone to act on your behalf (like a power of attorney or executor) or as a beneficiary, be sure to name an alternate in case the person you name is unable to serve or doesn't survive you.
4. If you want certain personal property (e.g., family heirlooms) to go to certain people, start a list. Be as specific as possible when describing the items and include their location.
5. If any of your beneficiaries owe you money when you die, do they need to pay it back to your estate?
6. Do you want to leave any money/assets to charity?
7. If there is a catastrophic event and none of your family members survive you, who do you want to receive your assets?
8. If you have pets, whom do you want to care for them? Will you leave them money/assets for this purpose?
9. If your survivors will need access to your online accounts, create a list with account names and passwords.
10. If you're not formally preplanning your funeral, consider leaving some sort of instructions for your survivors so they know what you would (or wouldn't) like.