

B RITE ESTATE PLANNING CHECKLIST

“Getting your affairs in order, for your family’s sake”

What are your Estate Planning Goals?

- ✓ Who would you like to leave your assets to?
- ✓ Who will you appoint as your Personal Representative?
- ✓ Who will you appoint as Guardian to your minor children?
- ✓ Are you leaving gifts to a non-profit organization?

List all your Assets, such as:

- ✓ Real Estate and Property
- ✓ Investments and Bank Accounts
- ✓ Vehicles and Other Assets
- ✓ Life Insurance Policies

List all your Debts, such as:

- ✓ Mortgages
- ✓ Loan Balances
- ✓ Credit Card Balances
- ✓ Balances owed on vehicles and other assets

Create Your Estate Planning Documents, such as:

- ✓ Last will & Testament
- ✓ End of Life Plan
- ✓ Power of Attorney
- ✓ Healthcare Directive
- ✓ Revocable Living Trust

Notarize, Store and Copy your Estate Plan

- ✓ Schedule your Mobile Notary Public appointment with B Rite
- ✓ Store your Estate Plan in a safe or safety deposit box
- ✓ Provide copies of your Estate Plan to your representative and your family
- ✓ Review your Estate Plan every year to make any needed changes or updates

B Rite Family Finance, LLC
Mobile Notary Public

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Call or Text