Estate Planning - A Gift to the People You Love

More Than a Will

Most people think of estate planning as legal paperwork: wills, trusts, and powers of attorney. While these elements are essential - they are just the beginning.

True estate planning includes making decisions and establishing guidelines to make life easier for your loved ones at one of the most difficult moments they'll ever face. That means planning not only for the distribution of your assets but also to ease the emotional and logistical burden that comes in the days after a death. As an estate planning attorney, I often see grieving families struggling without clarity or confidence to make these decisions regarding funeral arrangements as well as tackling seemingly overwhelming tasks such as writing an obituary, and hunting for contact information, documents and accounts.

A little planning goes a long way. Here is a comprehensive checklist of matters that can be addressed and information that can be compiled to create a roadmap and information repository for your loved ones.

Estate Planning Essentials Checklist

Legal & Healthcare Documents

- Will and/or Revocable Trust
- Durable Power of Attorney (financial decisions)
- Healthcare Proxy and Medical Directive (Living Will)
- Guardianship designation for minor children

Personal Information

- Full legal name and dates of birth of all children
- List of key family members, advisors, and your chosen executor(s), trustee(s)
- Digital assets: passwords, accounts, and instructions on access
- Safe deposit box: location, key holders and contents

End-of-Life Logistics

- Funeral and burial/cremation preferences
- Any prepaid funeral or burial arrangements
- Preferred location and style of service (religious/secular, public/private)
- Contact list for people to notify (family, friends, clergy, organizations)
- Draft obituary or at least a list of important life highlights
- Preferred photograph for obituary or service
- Charities or causes for memorial donations

Financial Overview

Remember to include account numbers, approximate balances, ownership info, and contact details for institutions, financial advisor(s), insurance professional.

Cash & Equivalents

- Checking and savings accounts
- Money market accounts
- Treasury bills
- Investments
- Stocks and equity mutual funds
- Bonds (Treasury, municipal, Series E or H)

Real Estate

- Primary residence (fair market value, mortgage balance, net value)
- Additional real estate (locations, estimated values)

Retirement & Insurance

- Life insurance policies
- Pension or profit-sharing plans
- IRA, 401(k), or other retirement accounts
- Deferred compensation

Business Interests & Other Assets

- Business ownership or equity interests
- Tangible personal property (vehicles, art, jewelry, collections)
- Joint accounts with children or others
- Other insurance (homeowners, long-term care, umbrella policies)

Don't Make These Decisions Alone

Please reach out to so that we can help you with a comprehensive plan that reflects your values and protects your loved ones. It's never too early - or too late - to take control of your legacy. The most important thing is to start.

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