

ESTATE PLANNING

checklist

Prepared as a helpful planning guide by Bappert Law, PLLC.

Use this checklist to organize important information and documents when preparing your estate plan.

PERSONAL INFORMATION

- FULL LEGAL NAME, ADDRESS, AND PHONE NUMBER
- DATE OF BIRTH AND SOCIAL SECURITY NUMBER
- LIST OF IMMEDIATE FAMILY MEMBERS
- EMERGENCY CONTACTS

CORE ESTATE PLANNING DOCUMENTS

- LAST WILL AND TESTAMENT
- REVOCABLE LIVING TRUST (IF APPLICABLE)
- DURABLE FINANCIAL POWER OF ATTORNEY
- PATIENT ADVOCATE DESIGNATION (MICHIGAN MEDICAL POWER OF ATTORNEY)
- LIVING WILL OR END-OF-LIFE CARE INSTRUCTIONS
- HIPAA AUTHORIZATION
- FUNERAL REPRESENTATIVE DESIGNATION

ASSETS TO REVIEW AND ORGANIZE

- REAL ESTATE AND PROPERTY DEEDS
- BANK ACCOUNTS
- INVESTMENT ACCOUNTS
- RETIREMENT ACCOUNTS (401K, IRA, PENSIONS)
- LIFE INSURANCE POLICIES
- BUSINESS OWNERSHIP INTERESTS
- VEHICLES AND TITLED PROPERTY
- DIGITAL ASSETS AND ONLINE ACCOUNTS

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LAST WILL & TESTAMENT PLANNING

- NAME YOUR PERSONAL REPRESENTATIVE (PR / EXECUTOR)
- NAME A SUCCESSOR PERSONAL REPRESENTATIVE
- OUTLINE HOW ASSETS WILL BE DISTRIBUTED IF THERE IS NO TRUST
- IDENTIFY SPECIFIC GIFTS OR BEQUESTS
- NAME GUARDIANS FOR MINOR CHILDREN
- PROVIDE INSTRUCTIONS FOR PERSONAL PROPERTY DISTRIBUTION

BENEFICIARY REVIEW

- CONFIRM BENEFICIARIES ON RETIREMENT ACCOUNTS
- CONFIRM BENEFICIARIES ON LIFE INSURANCE POLICIES
- UPDATE PAYABLE-ON-DEATH BANK ACCOUNTS
- ENSURE BENEFICIARY DESIGNATIONS ALIGN WITH YOUR ESTATE PLAN

GUARDIANSHIP CONSIDERATIONS

- NAME A GUARDIAN FOR MINOR CHILDREN
- NAME A BACKUP GUARDIAN
- PROVIDE WRITTEN GUIDANCE FOR CHILDREN'S CARE IF NECESSARY

TRUST PLANNING (IF APPLICABLE)

- NAME A TRUSTEE AND SUCCESSOR TRUSTEE
- IDENTIFY ASSETS THAT WILL FUND THE TRUST
- DEFINE HOW AND WHEN ASSETS SHOULD BE DISTRIBUTED

END OF LIFE PLANNING

- DOCUMENT MEDICAL TREATMENT PREFERENCES
- CONSIDER FUNERAL OR BURIAL PREFERENCES
- DOCUMENT ORGAN DONATION DECISIONS

IMPORTANT RECORDS LOCATION

- WHERE ORIGINAL ESTATE PLANNING DOCUMENTS ARE STORED
- SAFE DEPOSIT BOX INFORMATION
- LIST OF KEY PROFESSIONAL CONTACTS (ATTORNEY, ACCOUNTANT, FINANCIAL ADVISOR)



This checklist is for informational purposes only and does not constitute legal advice.