Estate Planning Master Checklist (Client-Facing)

Personal Information

- ☐ Full legal name
- ☐ Date of birth
- ☐ Social Security number
- ☐ Marital status
- ☐ Children/dependents (names & ages)

Key Estate Documents

- ☐ Last Will & Testament
- ☐ Living Trust (if applicable)
- ☐ Durable Power of Attorney (financial)
- ☐ Healthcare Power of Attorney
- ☐ Advance Healthcare Directive / Living Will
- ☐ Guardianship designations (minor children)

Assets Inventory

Real Estate

- ☐ Primary residence
- ☐ Rental or investment properties

Financial Accounts

- ☐ Bank accounts
- ☐ Investment accounts
- ☐ Retirement accounts (401k, IRA, pension)

Insurance

- ☐ Life insurance policies
- ☐ Disability insurance

Business Interests

- ☐ Business ownership
- ☐ Operating agreements / buy-sell agreements

Personal Property

- ☐ Vehicles
- ☐ Valuables (jewelry, art, collectibles)

Beneficiaries & Designations

- ☐ Primary beneficiaries listed
- ☐ Contingent beneficiaries listed
- ☐ Beneficiary designations reviewed and updated

Debt & Obligations

- ☐ Mortgages
- ☐ Credit cards
- ☐ Personal or business loans

Final Wishes

- ☐ Funeral or memorial preferences
- ☐ Burial or cremation instructions
- ☐ Organ donation preferences

Review & Updates

- ☐ Reviewed annually
- ☐ Updated after life changes (marriage, divorce, birth, death)