

Estate Planning Checklist

Everything You Need for a Complete Estate Plan

Essential Documents

- Revocable Living Trust
- Pour-Over Will
- Durable Financial Power of Attorney
- Advance Healthcare Directive
- HIPAA Authorization
- Certificate of Trust
- Nomination of Guardian (if you have minor children)

Asset Inventory

- Real property (homes, land, rental property)
- Bank accounts and CDs
- Investment and brokerage accounts
- Retirement accounts (401k, IRA, Roth IRA, pension)
- Life insurance policies
- Business interests and ownership stakes
- Vehicles, boats, and recreational vehicles
- Valuable personal property (jewelry, art, collectibles)
- Digital assets and cryptocurrency

Beneficiary Designations to Review

- Life insurance policies
- Retirement accounts (401k, IRA)
- Payable-on-death (POD) bank accounts
- Transfer-on-death (TOD) brokerage accounts
- Health savings accounts (HSA)

Trust Funding Steps

- Transfer real property deeds into the trust
- Update bank account titling to the trust
- Retitle investment accounts to the trust

- Assign personal property via a schedule of assets
- Update vehicle registration (if applicable in your state)
- Confirm beneficiary designations align with the trust

Important Contacts to Designate

- Successor trustee(s)
- Executor / personal representative
- Guardian(s) for minor children
- Agent under power of attorney
- Healthcare agent
- HIPAA-authorized individuals

Need help completing your checklist? Book a consultation at www.woodlegallgroup.com/book