

ESTATE & LEGACY PLANNING

CHECKLIST

A DIFFERENT WAY TO LOOK AT ESTATE PLANNING

Most people think estate planning is something you complete. Documents are signed. A binder is created. The process feels finished.

This checklist is designed to look at it in a different way.

Instead of asking whether your plan exists, it helps you consider whether your plan is organized, clear, and ready to be followed by the people who matter most.

This is not a legal review. It is a practical look at how prepared your family may be if they ever need to step in.

For each section, consider whether the item feels complete, needs attention, or has not yet been addressed.

1. THE BASICS ARE IN PLACE

- I have a will or trust that reflects my current wishes
- I have designated individuals to make financial and healthcare decisions if needed
- My documents have been reviewed within the past few years
- I know where these documents are located and how to access them

2. THINGS ARE ORGANIZED

- Important documents are stored in one central location
- Financial accounts and policies are easy to identify
- Key contact information is documented and accessible
- Someone I trust would know where to begin if needed

3. EVERYTHING IS ALIGNED

- Beneficiary designations reflect my current intentions
- My accounts and policies are consistent with my overall plan
- I have reviewed these items within the past few years
- I understand that some assets pass outside of my will or trust

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4. THE RIGHT PEOPLE ARE PREPARED

- I have selected individuals to carry out important responsibilities
- Those individuals are aware of their role
- I believe they would feel confident stepping in
- I have had basic conversations with them about expectations

5. THE FIRST STEPS ARE CLEAR

- I have considered what should happen in the first few days after a major event
- My family would know who to contact first
- Important instructions are written in a clear and simple way
- Immediate financial and logistical needs have been considered

6. MY FAMILY HAS SOME CLARITY

- My family understands the general structure of my plan
- I have communicated expectations at a high level
- I have addressed areas that could lead to confusion
- I have provided guidance without overwhelming detail

7. MY PLAN REFLECTS TODAY

- My plan reflects my current family and financial situation
- Major life changes have been considered
- I review my plan periodically
- I understand that planning evolves over time

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8. IT'S EASY TO FOLLOW

- My plan is organized in a way that is easy to understand
- Instructions are clear and practical
- Someone unfamiliar with my plan could follow it
- The goal is simplicity, not complexity

9. IT REFLECTS MORE THAN ASSETS

- I have considered what I want my family to experience, not just receive
- I have communicated values or intentions where appropriate
- I understand that legacy includes more than finances
- I have taken steps to provide clarity for future generations

WHAT YOUR RESPONSES MAY MEAN

If several areas feel incomplete or unclear, that does not mean your plan is wrong. It may simply mean your plan has not been revisited from an organization and readiness standpoint. That is where a conversation can help.

NEXT STEPS

- Review your responses with a financial professional
- Identify areas that may benefit from better organization or clarity
- Take steps to make information easier to access and understand
- Coordinate with legal professionals if updates are needed

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IMPORTANT NOTE

This checklist is for educational purposes only. It is not legal advice and does not replace guidance from qualified legal professionals.

FINAL THOUGHT

Estate planning is not only about what is written. It is about whether your plan can be followed with clarity when it matters most.

