

Estate Planning Checklist

1 Last Will and Testament

- Appoint a guardian for children
- Appoint a guardian for pets
- Decide who gets what assets
- Appoint an Executor to carry out your wishes

2 Living Trusts

- Inventory all assets and decide who gets what
- Place all assets in the name of the Trust
- Appoint a successor Trustee to manage the Trust once you pass

3 Designation of Beneficiaries

Appoint a beneficiary for all non-probateable assets, which include:

- Retirement accounts
- Life insurance policies
- Pensions
- Bank accounts
- Automobiles

4 Healthcare Documents

- Declare your healthcare preferences in a Living Will
- Appoint an agent to make medical decisions on your behalf in a Health Care Power of Attorney

5 Durable Power of Attorney for Finances

- Appoint an agent to manage your finances on your behalf
- Appoint your agent as your guardian, should one be needed
- Give your agent a broad range of powers, such as to qualify you for Medicaid if needed

6 Proof of Identification

Gather your proof of identification cards

- Social Security Card
- Birth certificates
- Marriage certificate(s)
- Divorce certificate(s)
- Prenuptial agreements

7 Digital Accounts

Gather a list of all digital assets

- Financial accounts
- Social media accounts
- Emails
- Streaming services
- Other

8 Titles and Deeds

Gather all titles and deeds for your assets

- Homes
- Vehicles
- Real estate

If you have a Trust, re-title all assets into the ownership of the Trust.

9 Insurance and Financial Info

Gather copies of all insurance policy documents:

- Life
- Health
- Car
- Home

Create a list of financial accounts and institutions:

- Bank accounts
- Credit cards
- Mortgages
- Loans

10 End-of-Life Instructions

- Lay out your instructions for funeral preferences:
- Method of disposition (burial, cremation, etc.)
- Type of service
- What you want done/said.

At Carson Law, we know that planning for the future can be emotional and challenging. Our empathetic and experienced team is here to guide you through the process, ensuring your wishes are honored and your family is cared for.

Plan your estate now so that your family is protected during their time of grief. Allow us to help you make these vital decisions today, providing peace of mind for everyone.

Contact Carson Law Firm and let us offer the expertise and support you deserve in this crucial time.

"Together, we'll create a lasting legacy."



HAVE QUESTIONS? CONTACT US: **888-403-1259**

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