Estate Planning Checklist

	Items to Locate	Located	Location/Information	Given to Attorney
1	Any Prior Wills, Trusts and Codicils	❑		❑
2	Spouse's Will and Codicils	❑		❑
3	Full name, birthdate, social security number	❑		❑
4	Information regarding children – names, ages, contact information, born or adopted, etc.	❑		❑
5	Documentation regarding citizenship(if applicable)	❑		❑
6	Marriage license	❑		❑
7	Prenuptial agreement	❑		❑
8	Marital or partition agreements	❑		❑
9	Divorce decrees	❑		❑
10	Information regarding funeral arrangements	❑		❑
11	Contact information for your chosen executor (the person who will carry out the terms of your will)	❑		❑
12	Names and contact information for your chosen beneficiaries (this can be an individual, organization, or charity)	❑		❑
13	Specific Bequests/Gifts that you want made in your Will (for example, my wedding ring to my daughter)	❑		❑
14	Contact information for your chosen Trustee (the person who will carry out the terms of your Trust)	❑		❑
15	Contact information for your chosen Guardian (the person who will care for any minor children)	❑		❑
16	Information regarding safety deposit box	❑		❑
17	Assets and Debts			
	a) Real Property (need legal description)	❑		❑
	b) Mineral Interests	❑		❑
	c) Rental and Lease Contracts	❑		❑
	d) Bank Accounts (need name of bank) and account numbers, owners of account, and what type of an account	❑		❑
	e) SavingsAccounts(need name of bank and account numbers, numbers, owners of account, and what type of an account)	❑		❑
	f) Savings & Loan Accounts (need name of bank and account owners of account, and what type of an account)	❑		❑
	g) Credit Unions (need name of bank and account numbers, owners of account, and what type of an account)	❑		❑

	h) Securities and Investments – stocks, bonds, brokerage accounts, mutual funds, annuities, stock options, etc. (need names, account numbers, and ownership interest)	❑		❑
	i) Security Interest (have you been granted a security interest in any property?)	❑		❑
	j) Tax Deferred Accounts/Plans – i.e. 401(K) plans, individual retirement accounts (IRA), pension plans, benefit plans, employee stock ownership plans, any other retirement plans – (need names, account numbers, named beneficiaries)	❑		❑
	k) Non-Qualified Benefit Plans	❑		❑
	l) Company Benefits (employment trusts, accrued, unpaid bonuses, stock purchase plans, employment contracts)	❑		❑
	m) Life Insurance (need names, account numbers, named beneficiaries)	❑		❑
	n) Military Retirement Benefits	❑		❑
	o) Motor Vehicles (title, make, model, year, vin numbers)	❑		❑
	p) Equipment and Machinery(need description, make, model, vin numbers)	❑		❑
	q) Valuable Collections (need specific description of items in collection)	❑		❑
	r) Receivables (Does anyone owe you money?)	❑		❑
	s) Tax Refunds	❑		❑
	t) TaxPrepayments	❑		❑
	u) Lawsuits (Are you involved in a lawsuit?)	❑		❑
	v) Pending Claims against you	❑		❑
	w) Copyrights and Patents (Did you copyright or patent anything, or are any copyrights or patents pending?)	❑		❑
	x) Business Associations	❑		❑
18	List of your heirs with full names and contact information	❑		❑
19	Name of your Accountant	❑		❑
20	Name of your Financial Advisor	❑		❑
21	Financial Power of Attorney – Contact information for agent (the person who will make financial decisions on your behalf) and successor agent	❑		❑
22	Medical Power of Attorney – Contact information for agent (the person who will make medical decisions on your behalf) and successor agent	❑		❑
23	HIPAA Authorization – Contact information for those individuals you want to have access to your medical information	❑		❑