

# Estate Planning Checklist

Check each item when updated or completed in your planner...

- Legal name, permanent address, date of birth
- If divorced or separated, provide details, keep copy of court papers on file
- Pre or post marital agreements
- Current wills and codicils
- Living trust agreements and charitable trust agreements (revocable or irrevocable)
- Names and addresses of children and/or other heirs
- Names and addresses of persons to be your personal representative, guardian and/or trustee
- Life insurance policies - Ownership/beneficiaries/cash values
- Information on pensions, profit sharing and deferred compensation plans
- Business agreements related to corporations, partnerships and sole proprietorship interests.
- Listing of all real estate, including type of ownership, present fair market value, and mortgages
- Listing of personal property, including ownership, location, and value
- Outline of objectives and disposition of your estate
- Legal names and addresses of charitable organizations you wish to benefit

## Documents Needed - Check when completed!

- Will or Living Trust with Pourover Will (File signed original with your lawyer, keep an original signed copy in your records, signed copy with your spouse's records).
- Power of Attorney for Health Care (File with health care provider, family physician, POAHC)
- Durable Power of Attorney (File same as with your will and person you select to be POA)
- Information on all the above in the form of a booklet for loved ones... See booklet, Estate Planning for the Christian Steward (provided through estate planning office.).

## REACTION TO THIS LIST:

\_\_\_ **“OUCH! I NEED A PLAN QUICK! HELP!”**

\_\_\_ **“I have some gaps in my plan, help!”**

\_\_\_ **“I want to plan a bolder gift than I have already. Let's collaborate!”**

\_\_\_ **“I've got to share what I've done with the giving counselor! He'll be impressed!”**

**If you have any of these reactions, don't hesitate to call 507-469-9656.  
You can also find me on Facebook and use FB Messenger or text message to my phone.  
FaceTime (Apple) , or Skype are also alternatives to a face-to-face meeting.**

