

Crider Law Group

Your Estate Planning Checklist

Congratulations! You are at the starting line. Your Estate Planning Checklist is a handy summary of the key documents and tasks covered you and your loved ones will need in the event something happens to you.

Start here and use it to track your progress as you go. Print it out, save it to your desktop, email it to yourself, send it to your partner – whatever it takes to keep it top of mind until you make it through the list. Take it from the top, and check off as you go.

Remember: Scan it once a year to make sure everything is up to date. Important details change when you marry, divorce, have children, buy a home, etc.

The Rule: If you have a major life event, recheck your checklist

The Checklist

Review this document completely and keep this on file with your will and other important documents.

Will:

- I have completed my Will and listed
 - Durable Power of Attorney for Financial and Medical, and back-up person(s)
 - Custody of my child(ren) and back-up person
 - Distribution of my assets and personal items

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- My will is signed, notarized, and a copy has been given to those listed.

A copy of my will is located here: _____

Living Will:

- I have completed my Living Will
- Medical power of Attorney and back-up person
 - Advance Directives
 - Additional information and notice to my doctor
 - Discussed my wishes friends and family
 - Discussed or written down the type of funeral or memorial service I desire and any instructions about burial or cremation
 - I have considered where and how I would like to be cared for if I were terminally ill and discussed this with those closest to me
- The living will is signed, notarized, and a copy has been given to those listed.

A copy of my living will is located here: _____

Life Insurance:

- I have researched Life Insurance options and purchased the best possible plan for me and/or my family
- I have researched short-term disability and completed all steps
- I have researched long-term disability and completed all steps

A copy of my policy is located here: _____

Money:

- I have reviewed my financial situation and, if necessary, discussed this with those closest to me
- I have completed a budget and track monthly actual costs to my budget
- I have _____ weeks/months of expenses saved in case of an accident or emergency
- I have a plan in place to meet my goal to have _____ in an emergency fund by this date _____
- I have a savings plan and/or retirement plan

Details:

- I have listed my Personal Details out in case of emergency or some one else needs to retrieve it (passwords, contact information, accounts, etc)

A copy of my details list is located here: _____

Personal items:

- I have thought about my relationships and how I want to move forward to resolve any unfinished business
- I have reached out to those people
- I have deeply considered how my life lines up with my values and priorities, how I am spending my energy, and what I want to do differently to have the life that is meaningful and important to me

