ESTATE PLANNING CHECKLIST

Documents to Gather Before Meeting With Your Estate Planning Attorney

Preparing in advance can help you make the most of your estate planning meeting. Use this checklist to identify documents and information that may be helpful to gather before your appointment.

Existing Estate Planning and Legal Documents

- ☐ Current will and any codicils
- ☐ Revocable or irrevocable trust documents and amendments
- ☐ Durable power of attorney
- ☐ Health care surrogate designation or other advance directives
- ☐ Living will
- ☐ Prenuptial or postnuptial agreement, if applicable
- ☐ Relevant divorce or marital settlement documents, if applicable
- ☐ Documents relating to trusts from which you are a beneficiary or trustee

Family and Beneficiary Information

- ☐ Spouse or partner
- ☐ Children, stepchildren and grandchildren
- ☐ Other individuals who may depend on you financially
- ☐ Individuals or charitable organizations you may want to include in your estate plan
- ☐ Any beneficiary who may need additional planning considerations
- ☐ Guardians you may wish to consider for minor children

People You May Want to Serve in Important Roles

- ☐ Personal representative
- ☐ Agent under a durable power of attorney
- ☐ Guardian for minor children, if applicable
- ☐ Trustee and successor trustee
- ☐ Health care surrogate
- ☐ Alternate individuals for these roles

Real Estate

- ☐ Primary residence
- ☐ Vacation or second home
- ☐ Rental or investment property
- ☐ Vacant land
- ☐ Property owned outside Florida
- ☐ Property owned outside the U.S.
- ☐ Mortgages associated with real estate

Bank, Investment and Financial Accounts

- ☐ Checking accounts
- ☐ Savings accounts
- ☐ Certificates of deposit
- ☐ Brokerage and investment accounts
- ☐ Stocks, bonds and mutual funds
- ☐ Notes or other amounts owed to you
- ☐ Other significant investments

Retirement Accounts and Benefits

- ☐ 401(k) accounts
- ☐ IRAs
- ☐ Pension plans
- ☐ Profit-sharing plans
- ☐ Deferred compensation plans
- ☐ Other retirement benefits
- ☐ Current beneficiary designations

Life Insurance

- ☐ Current life insurance policy
- ☐ Approximate death benefit information
- ☐ Current beneficiary designation
- ☐ Information about policies owned by a trust or another person, if applicable

Business Interests

- ☐ Corporations or LLC interests
- ☐ Partnerships or joint ventures
- ☐ Sole proprietorships
- ☐ Buy-sell agreements
- ☐ Shareholder, partnership agreements
- ☐ Operating arrangements
- ☐ Stock redemption agreements
- ☐ Business succession arrangements

Other Assets and Financial Obligations

- ☐ Vehicles or boats
- ☐ Artwork, jewelry, collectibles or antiques
- ☐ Significant personal property
- ☐ Annuities
- ☐ Expected inheritances
- ☐ Significant loans or other liabilities
- ☐ Any other assets

Charitable Giving

- ☐ Charities, churches, schools, foundations or other organizations you may want to support
- ☐ Whether you are considering a lifetime gift or a gift through your estate
- ☐ Whether you want to leave a specific amount, asset or percentage
- ☐ Whether you want a gift used for a particular purpose
- ☐ Whether a charitable organization is already named as a beneficiary on an account or policy

Your Professional Advisors

- ☐ Accountant or CPA
- ☐ Financial advisor
- ☐ Insurance professional
- ☐ Trust officer
- ☐ Other attorneys or professional advisors

Before Your Meeting

You do not need to have every decision made before meeting with an estate planning attorney. It can be helpful to think about what you want your estate plan to accomplish, who you want to provide for, who you trust to make decisions if you cannot and whether charitable giving is part of your plans.

Important: This checklist is intended as a general preparation guide. Your attorney can advise you about what additional information or documentation may be needed for your particular estate plan.